

How were you referred to our office? _____

Have you filed all tax returns which are due to be filed? Y N Do you owe state or federal taxes? Y N

Have you ever been divorced or legally separated? Y N If yes, is there a pending property settlement? Y N

Do you have domestic support or child support obligations? Y N If yes, are you currently in default? Y N

Do you owe student loan(s)? Y N If yes, are you currently in default? Y N

Have you made payments on someone else's student loan(s) in the last 2 years? Y N

Do you owe restitution obligations or fines? Y N Do you owe traffic fines? Y N

Do you have overpayments to welfare, food stamps, unemployment compensation and/or social security? Y N

Have you opened an account, received a loan or charged more than \$650 on one credit card in the past 90 days? Y N

Have you taken out a pay day or cash advance loan(s) in excess of \$925 within the past 70 days? Y N

Have you made payments to any one unsecured creditor totaling more than \$600 recently? Y N

Can you sue anyone for any reason? Y N, if yes, explain: _____

Have you sold or transferred any property within the past 2 years? Y N

Other than birthday or Christmas gifts, have you given away anything of value within the last year? Y N

Do you owe money to friends or relatives? Y N Have you repaid friends or relatives money in the last year? Y N

Have any of your creditors filed a lawsuit against you in the last year? Y N

Have your wages been garnished or bank account(s) attached in the last 90 days? Y N

Have you had a car repossessed in the last year? Y N Do you have a pending repossession? Y N

Have you had a home foreclosed upon in the last year? Y N Do you have a pending foreclosure? Y N

Has anyone co-signed a debt for you? Y N Have you co-signed a debt for anyone? Y N

Do you have any property that belongs to someone else? Y N Is anyone holding property for you? Y N

Have you had any losses from fire, theft, gambling or other casualty in the last year? Y N

Have you purchased a vehicle in the last six (6) months? Y N Do you have a safety deposit box? Y N

Have you closed a bank account(s) in the last six (6) months? Y N

Are you making automatic payments to creditor(s) from a bank account and/or directly from your pay checks? Y N

Is it possible that you may become entitled to an inheritance, life insurance proceeds and/or large sum of money? Y N

Have you owned or operated a business in the last 6 years? Y N If yes, please describe: _____

PLEASE LIST BELOW ANY SPECIAL CONCERNS OR ISSUES YOU WOULD LIKE TO DISCUSS:

Date: _____ Signature: _____

Date: _____ Signature: _____