

First Appointment Sheet

RHC _____ KLH _____ RJC _____ Other _____

Exceeds median income? Y/N

Our policy is to treat the first meeting as one that will help you to better understand your options. You are not going to be asked to decide whether or not you want to hire us to take any actions. Instead, we will review your financial situation, counsel with you, and establish the fees and costs of the various options if there are any. We will, of course, answer your questions and put what we can into writing so that you can take it home to review.

Note: this online form has 8 pages. To continue to the next page click the drop down menu in the upper-right corner of the page. You may move from field to field using the tab key. To view the rest of each page use the scroll bar on the right side of the screen.

Please answer as completely as possible

Today's date is

Your full name is

Your social security number will need to be provided at the first meeting.

Your date of birth is

Your spouse's full name is

Your spouse's social security number will need to be provided at the first meeting.

Your spouse's date of birth is

Have you or your spouse owned a business or been self employed in the last 6 years?

Yes No If so, state the name and dates (beginning and ending or operation of each)

Your mailing address
(with zip code, please):

County:

Phone numbers: House:

Yourself: Work: Cell:

Spouse: Work: Cell:

Your email address:

Income

Yourself

Your spouse

Name of employer	<input type="text"/>	<input type="text"/>
How often are you paid?	<input type="text"/>	<input type="text"/>
Hourly rate	\$ <input type="text"/>	\$ <input type="text"/>
Normal hours per pay period	<input type="text"/>	<input type="text"/>
Overtime rate	\$ <input type="text"/>	\$ <input type="text"/>
Estimated overtime hours	<input type="text"/>	<input type="text"/>
Annual salary	\$ <input type="text"/>	\$ <input type="text"/>
Commissions	\$ <input type="text"/>	\$ <input type="text"/>
Attorney use only	<input type="text"/>	<input type="text"/>

Do you receive income from any other source whatsoever (including but not limited to food stamps, social security, disability, child support/alimony, retirement, worker's compensation)?

Yes No If yes, what is the source(s) and the amount(s) per month?

How many children live at home with you?

Is there anyone else living in your home with you? List:

Have all of your tax returns (Federal, State) been filed in the past 6 years? Yes No

If you are a sole proprietor are you paying quarterly estimated taxes? Yes No

Did you receive a tax refund last year, or this year? Yes No

If so, how much Federal and State refund did you receive?

\$

Do you owe any Federal or State taxes? Yes No

If "Yes", what is the amount? \$

Have you ever filed bankruptcy before? Yes No

If so, when, and what was the outcome?

Real Estate

Are you buying or renting the place where you live?

Buying Renting

How much are the monthly payments for your residence?

\$

Is the place where you live a house, mobile home, or an apartment?

If you own a house, mobile home or land please answer the following:

In whose name is it titled?

In what year was it purchased?

How much did you pay?

How much was the down payment?

If you own a mobile home, what size is it?

If you own land, what is the acreage?

Please state your estimate of the value and amount owed on your property:

Property	Value	Amount Owed
Home	\$ <input type="text"/>	\$ <input type="text"/>
Mobile Home	\$ <input type="text"/>	\$ <input type="text"/>
Land	\$ <input type="text"/>	\$ <input type="text"/>

** If you own, or own interest in more than one house, mobile home, or parcel of land, please make sure you answer the questions above for all of them.*

Have you owned any other real estate in the past 6 years (including property you inherited or that you may own with others)?

Have you had any property repossessed, seized, or have you voluntarily surrendered any in the last 6 years? If so, please describe property and approximate date(s).

Do you own any burial plots? Yes No

If so, how many?

What is their estimated value? \$

How many vehicles do you and your spouse own?

(Registered in your name or your spouses)

Please note the year, make, model, miles, amount owed and value of each:

	Year	Make	Model	Miles	Amount Owed	Value
Auto #1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Auto #2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Auto #3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Auto #4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you own a Boat? Yes No

Year	Make	Model	Motor	Trailer Y/N	Amount Owed	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you own any motorcycles, ATV's, jet ski's, campers, 4-wheelers, go-carts, etc.?

Year	Make	Model	Motor	Trailer Y/N	Amount Owed	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you own any stock, bonds, IRA's, 401(k), pension or other annuities? If so, please list:

Have you cashed in or taken a loan against these accounts?

Please state the amount of cash, checking and savings you currently have and the name of the institution in which it is deposited:

Do you owe any of these institutions money?

CAUTION: If you place funds in a bank or credit union to which you owe money, they are allowed by law to take your money. Therefore, you may want to place your money in an institution you do not owe.

If you own any life insurance, does it have any cash or loan value?

Yes No

If yes, what is the amount you can withdraw from the policy right now?

Have you taken any loans against an insurance policy? If yes, when did you withdraw money and how much did you withdraw?

Do you own any tools, machinery or equipment that you use in your work or business? If so, what is their value? Describe:

Please state whether or not you have sold or given away any of your property whatsoever within the past 6 years. If so, please explain:

Have you or your spouse repaid or given a friend or relative \$600 or more in the last year? If so, explain:

Have you ever been separated or divorced? Yes No

If so, when?

If so, were you ordered by the Domestic Court to pay certain debts?

Yes No If "Yes", please list:

Do you have any student loans or have you co-signed on any?

Yes No

Does anyone owe you more than \$600.00 including family members and friends?

Yes No If yes, please explain:

Do you have any auto accidents, worker's compensation or medical malpractice claims pending?

Yes No If yes, please explain:

Have you received money from these types of claims in the last 3 years?
If yes, please explain.

Has anyone gotten a judgment against you in a Court?

Yes No If yes, please explain:

How did you hear about our law firm?

Please list all dependants and anyone living in your household:

Full Name	Age	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Please state the reason(s) you are considering bankruptcy:

Is there any other information you feel we need to know in order to provide counsel to you in this matter? If so, please make a note of it here:

Attorney use only:
