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CONFIDENTIAL BK INITIAL OFFICE CONSULTATION

IT IS CRITICAL that you provide a complete list of ALL ASSETS and ALL DEBTS. Fill out this form as completely as possible. Use a separate sheet to list creditors and the amounts owed. If you do not know the exact amount, please list your best estimate.

NAME(s): _____
MARITAL STATUS: _____ SPOUSE'S NAME: _____
ADDRESS: _____
CITY/STATE/ZIP: _____
TELEPHONE NO: _____ CELL NO: _____
EMAIL: _____ PREFERRED CONTACT: _____
OCCUPATION: _____ EMPLOYER: _____

Yes / No

___/___ Do you have any assets/debts under another name:

___/___ Have you ever been divorced?

___/___ Do you own a home? Value:

___/___ Do you own any other real estate? Value:

___/___ Are your furniture and appliances worth less than \$1000.00?

___/___ Have you co-signed a loan for anyone or has anyone co-signed for you?

___/___ Have you purchased anything (except vehicles) on a payment plan?

___/___ Have you borrowed money from friends/family and paid it back?

___/___ Do you have any active credit cards? Last used:

___/___ Do you have an open student loan?

___/___ Do you owe any taxes? federal, state, property, other

___/___ Have you filed your income tax returns? Last year filed: -----

___/___ Are you expecting a tax refund? How much:

___/___ Have you ever filed for bankruptcy? When:

___/___ Do you have an IRA, pension, profit sharing, or retirement plan?

___/___ Do you have any law suits, foreclosures or judgments against you?

___/___ Have you filed any law suits against others? (including injury)

List any motor vehicle, boat or plane in the family:

1. Make/Model: _____ Year: _____ Value: _____
Financed wwith: _____ Balance owing: _____

2. Make/Model: _____ Year: _____ Value: _____
Financed with: _____ Balance owing: _____

Annual income (include spouse): _____
Approximate total amount of debt: _____ Number of creditors: _____

