**Client Data Sheet – financial problems & bankruptcy**

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A. CLIENT

|  |  |
| --- | --- |
| Name | Other Names Used During the Past 6 Years |
| Mailing Address | Years at this Address? | Email |
| City, State Zip | Phone #s (Cell) + (Home) + (Work) |
| Employer | Position/Title |

B. SPOUSE

|  |  |
| --- | --- |
| Name | Other Names Used During the Past 6 Years |
| Mailing Address | Years at this Address? | Email |
| City, State Zip | Phone #s (Cell) + (Home) + (Work) |
| Employer | Position/Title |

C. ASSETS

|  |  |
| --- | --- |
| **Automobile(s)** 🞏 Yes 🞏 No | **Yr. Model** |
| **Real estate** 🞏 Yes 🞏 No | **Loc.** |
| **Checking accounts** 🞏 Yes 🞏 No | **Balance $** |
| **Savings accounts** 🞏 Yes 🞏 No | **Balance $** |
| **Savings bonds, stocks** 🞏 Yes 🞏 No | **List** |
| **Life insurance** 🞏 Yes 🞏 No | **Surrender Value $** |
| **Household furniture** 🞏 Yes 🞏 No | **Describe** |
| **Tools** 🞏 Yes 🞏 No | **Describe** |
| **Collections or jewelry** 🞏 Yes 🞏 No | **Describe** |

D. MAJOR BILLS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Creditor Name** | **Approx. Balance** | **Monthly Payments** | **Months Behind** | **Joint or Single** | **Collateral Pledged** |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| 5. |  |  |  |  |  |

**Have you filed Bankruptcy before? \_\_\_\_\_\_\_\_\_\_ When ? \_\_\_\_\_\_\_\_\_\_**

**What is your current yearly income (before taxes)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse’s yearly income? \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Has any property been repossessed? \_\_\_\_\_\_\_\_\_\_ When? \_\_\_\_\_\_\_\_\_\_**

**Are you involved in a lawsuit? \_\_\_\_\_\_\_\_\_\_ Explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**