

Affordable Attorney Advice Customer Worksheet

How to Use This Worksheet:

The information you provide here will help the advising attorney prepare for your initial interview. It will not be disclosed to anyone without your permission. Do your best to complete all sections on both sides of each page, and answer all questions. If you can't come up with a specific number when answering questions about property values and debt amounts, give it your best ballpark estimate.

Make sure you include this worksheet with your contract and money order.

GENERAL:

- Have you filed bankruptcy within the past 8 years? Yes No
- Have you lived in California for at least two years? Yes No
- Have you been sued? Yes No
- Has a creditor obtained a judgment against you? Yes No
- Have your wages been garnished? Yes No
- Have you used your Credit Cards within the past three months? Yes No
- Are you facing a foreclosure? Yes No I don't know

REAL ESTATE:

- Do you own your own home?** Yes No
- If yes: Are you current w/payments? Yes No
- Is this your primary residence? Yes No
- What is your total mortgage debt (1st and 2nd)? \$ _____
- What is your property worth: \$ _____

(Call a Real Estate agent or, if necessary, use www.zillow.com to get an estimate of your home's current value.)

- Do you own any other houses or real estate** Yes No
- If so, are you current w/payments? Yes No
- What is your total mortgage debt on the property?: \$ _____
- What is the property worth: \$ _____

(Call a Real Estate agent or, if necessary, use www.zillow.com to get an estimate of your home's current value.)

MARITAL STATUS:

- Are you legally married?** Yes No I don't know
- If so, do you plan to file together? Yes No I don't know
- Are you separated? Yes No How many years:___? Legal Separation? _____

How many people live in your household (including yourself)? _____

(Be sure to include any one you live with and share income and expenses with, such as spouses, children, other relatives or domestic partners, even if they are not your legal dependents)

What is your gross average monthly household income for the entire household, from all sources including child support, alimony, social security, wages, etc. (before taxes) \$ _____

If your income or expenses have changed significantly in the past six months, or will be changing in the next six months, please describe here:

MOTOR VEHICLES:

List the **year, make, model, mileage and approximate market value** of vehicles you own outright:

Vehicle # 1 _____

Vehicle # 2 _____

List the **year, make, model, mileage, approximate market value and how much you owe on** vehicles you are making payments on:

Vehicle # 1 _____

Do you want to keep it? Yes No I don't know

Vehicle # 2 _____

Do you want to keep it? Yes No I don't know

PERSONAL PROPERTY:

Do you have any property at all worth more than \$500 an item? Yes No

If so, please list here: _____

Do you have any pending personal injury claims? Yes No

Do you have any workers compensation settlements or claims? Yes No

Do you expect to or did you receive a tax refund this year? Yes No

Do you have any reason to sue anybody for money? Yes No

Do you have a retirement plan or pension? Yes No

Are you on Social Security or Disability (SSDI or SSI)? Yes No

BANK AND DEPOSIT ACCOUNTS

How much money do you have in savings? \$ _____ Checking? \$ _____

Do you sign on anyone else's bank account (for any reason)? Yes No

Do you have deposit accounts with a bank or credit union that has issued you a credit card or that loaned you money secured by your house, car, or other personal property? Yes No

