## 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 more	nths?	[] 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 t	to get an estin	nate of your home	e's current value.)
Do you own any other houses or real estate		[] Yes	[ ] No
If so, are you current w/payments?		[] Yes	
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 estin	nate of your hom	e'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 people live in your household (including yourself)? \_\_\_\_\_

(Be sure to include any one <u>you live with and share income and expenses with</u>, 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 <u>for the entire household</u>, from all sources including child support, alimony, social security, wages, etc. (before taxes) <u>\$\_\_\_\_\_</u>

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 <u>any</u> 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 SS	SI)?	[] Yes	[ ] No
BANK AND DEPOSIT ACCOUNTS			
How much money do you have in savings? \$	Che	cking? \$	

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

Do you sign on anyone else's bank account (for any reason)?

#### **PROPERTY TRANSFERS:**

Have you transferred any	property (land, house, car, etc.) to anyone in the last four years? [ ] Yes [ ] N	No
If so, what and when?		

TAX RETURNS: What is the last year you filed a tax return?

### DEBTS:

Please list the total estimated amount owed in the following categories:

Credit card debt:	\$ 
Personal (unsecured) loans, including loans from relatives:	\$ 
Medical or dental debts:	\$
Deficiency owed because of a foreclosure, or car repossession:	\$
Debts you owe as a co-signer:	\$
Pay day advance loans:	\$
Judgments against you for money:	\$
Secured Debt: Cars, mortgages, etc:	\$
Other debts over \$500 (Please describe):	\$

Do you owe any of the following debts? (These debts may survive bankruptcy.)

[] student loans \$ \_\_\_\_\_\_ total

[]	child/spousal support \$	_ payment per month; Do you owe arrears?	
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[] back income taxes \$ \_\_\_\_\_\_ total. If yes, what tax years? \_\_\_\_\_

[] fines or restitution owed to court for traffic or criminal offences (\$\_\_\_\_\_)

[] debts owed under a separation or divorce agreement:

NOTES or QUESTIONS: