

Referral Source: _____

Bankruptcy Client Intake Form

Date: _____

Name: _____

Address: _____

Contact info: Phone: _____

Cell: _____

E-mail: _____

Brief Summary of Debt:

Actions pending: Y / N _____

Brief Summary of Assets:

Real Property: Y / N

Automobile(s): Y / N _____

Retirement Accounts: Y / N _____

Employment Status: FT / PT / Other / _____

of Dependents: _____

Unusual Conditions:

Used Credit Cards past 60 Days Y / N _____

Paid back relatives within past year _____

Sold, transferred or gave away property last year _____

Other: _____

Action Plan/Follow up:

Diary dates:

Open File/Send Client Welcome Letter - Now/ _____

Return Completed Assessment Forms and docs - 2 weeks/ _____

Legal Fee: \$1,500.00 plus filing fees (\$299.00) = \$1,799.00

Amount paid on Retainer: _____ \$500.00 required to start

Agreed upon payment schedule: \$ _____ weekly / monthly