

FOR DLG OFFICE USE: [] R [] HL [] NQ	Ch [] 7 [] 13 [] 11	Total Fees: \$	IC Staff:	Office:
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► CONFIDENTIAL INTAKE FORM The information you provide will remain strictly confidential. Please provide your best estimates.

Today's Date	Is this your first bankruptcy consultation? [] Yes [] No	Filed bankruptcy before? [] No [] Yes If Yes, what Chapter? [] 7 [] 13 [] 11 If Yes, what month and year did you file?
How did you hear about us? [] Internet [] Printed Ad [] Radio [] TV [] Seminar [] Webinar [] Other:		
[] Personal Referral's Name: _____ Phone Number: _____ Email: _____		

► DEBTOR 1 CONTACT INFORMATION

► SPOUSE/DEBTOR 2 CONTACT INFORMATION [] NA

Your First Name _____ Middle _____ Last _____	Spouse's First Name _____ Middle _____ Last _____
Street Address (Residence) _____	Street Address (Residence) [] Same as Spouse
City _____ State _____ Zip _____	City _____ State _____ Zip _____
Home Phone _____ Cell Phone _____ Work Phone _____	Home Phone _____ Cell Phone _____ Work Phone _____
Email Address _____ What State did you live in 2 years ago? _____	Email Address _____ What State did you live in 2 years ago? _____
Social Security No _____ Date of Birth _____	Social Security No _____ Date of Birth _____
Marital Status [] Single [] Married [] Divorced [] Widow	Marital Status [] Single [] Married [] Divorced [] Widow
No of Dependents _____	No of Dependents _____

► REAL ESTATE [] None If more than one property, please attach additional pages.

[CH 13 DEBT LIMITS: D: \$1,184,200 E/F: \$394,725]

Description	Present Value \$	Basis of Value	Yr Purchased	Purchase Price \$	Homestead? [] Yes [] No	Property Intentions [] Keep [] Sell [] Surrender
Best Estimates	Balance Owed	Mo. Payment	# Mo's Late	Amt to Reinstate	Not of Default Date	How is Title Held? [] Individual [] Joint [] Other
First Mortgage	\$	\$		\$		
Second Mortgage	\$	\$		\$		
Third Mortgage	\$	\$		\$		
Association Dues	\$	\$		\$		
Property Taxes	\$	\$		\$		
Judgment Liens	\$	\$		\$		
Other Liens	\$	\$		\$		

► VEHICLES, MOTORCYCLES, BOATS, RECREATIONAL VEHICLES List all, whether paid for or not.

Yr	Make	Model	Current Value	Loan or Lease	Payment	Balance	Mos Late	Intent
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender

► RETIREMENT & OTHER VALUABLE ASSETS

Asset Description	Value	Asset Description	Value	Asset Description	Value
Bank Accounts	\$	Annuity	\$	401K	\$
Pension	\$	IRA	\$	Inheritance	\$
Whole Life Insurance	\$	Stock:	\$	Other:	\$

▶ ADDITIONAL CREDITORS		Quantity	Combined Outstanding Bal.	Total charges last 6 months	Total payments last 6 months	Is there a Codebtor?	Mo's Late
1	Credit Cards (Visa, MC, Amex, Discover, etc)		\$	\$	\$	[] Yes [] No	
2	Dept Store Cards (Best Buy, Sears, Macy, etc)		\$	\$	\$	[] Yes [] No	
3	Personal Loans (Payday, Credit Union, etc)		\$	\$	\$	[] Yes [] No	
4	Loans from Family/Friends		\$	\$	\$	[] Yes [] No	
5	Auto Repo Deficiency		\$	\$	\$	[] Yes [] No	
6	Lawsuits/Judgments		\$	\$	\$	[] Yes [] No	
7	Foreclosure Deficiencies		\$	\$	\$	[] Yes [] No	
8	Student Loans		\$	\$	\$	[] Yes [] No	
9	Child/Domestic Support Obligations		\$	\$	\$	[] Yes [] No	
10	Medical Bills		\$	\$	\$	[] Yes [] No	
11	Lien Strip 1 (2 nd Mortgage, Judgment Lien, etc)		\$	\$	\$	[] Yes [] No	
12	Lien Strip 2 (3 rd Mortgage, Judgment Lien, etc)		\$	\$	\$	[] Yes [] No	
13	Taxes for Years:		\$	\$	\$	[] Yes [] No	
14	Other:		\$	\$	\$	[] Yes [] No	
15	Other:		\$	\$	\$	[] Yes [] No	
GRAND TOTAL			\$	\$	\$	D: \$1,149,525 E/F: \$383,175	

▶ GROSS INCOME (before taxes) FOR LAST THREE YEARS		2019 Year to Date Gross	2018 Gross	2017 Gross
1	Debtor 1	\$	\$	\$
2	Debtor 2	\$	\$	\$
3	TOTAL Combined Gross Income	\$	\$	\$

▶ CURRENT AVERAGE MONTHLY INCOME		DEBTOR 1	DEBTOR 2
OCCUPATION: Indicate your job title or what type of work you do.			
1	EMPLOYMENT INCOME: Average Monthly Gross Income (before taxes/deductions)	\$	\$
2	(-) Taxes, Medicare, Soc Sec Deductions	\$	\$
3	(-) Mandatory Retirement Deductions	\$	\$
4	(-) Voluntary Retirement Deductions	\$	\$
5	(-) Required Repayment of Retirement Loan Deductions	\$	\$
6	(-) Insurance Deductions	\$	\$
7	(-) Domestic Support Obligation Deductions	\$	\$
8	(-) Union Dues Deductions	\$	\$
9	(-) Other Deductions	\$	\$
10	Total Employment Deductions (Add Lines 2 through Line 10)	\$	\$
11	NET PAY FROM EMPLOYMENT (Line 1 minus Line 10)	\$	\$
12	SELF EMPLOYMENT INCOME: Average Monthly Gross Revenue (before any expense deductions)	\$	\$
13	(-) Average Monthly Business Expenses/Costs of Doing Business	\$	\$
14	NET PAY FROM SELF-EMPLOYMENT (Line 12 minus Line 13)	\$	\$
15	SOCIAL SECURITY INCOME	\$	\$
16	DOMESTIC SUPPORT/ALIMONY/CHILD SUPPORT:	\$	\$
17	REAL ESTATE RENTAL INCOME:	\$	\$
18	OTHER INCOME:	\$	\$
19	TOTAL AVERAGE MONTHLY INCOME FROM ALL SOURCES (Add Lines 11 and 14 through 18)	\$	\$
20	COMBINED TOTAL AVERAGE MONTHLY INCOME FROM ALL SOURCES (Add both columns of Line 20)	\$	\$

Household Size:

CA Median Income as of 11/1/18: 1 - \$4,715 2 - \$6,277 3 - \$6,833 4 - \$7,875 5 - \$8,575 6 - \$9,275 7 - \$9,975 8 - \$10,675

▶ AVERAGE MONTHLY LIVING EXPENSES		Debtor(s)	Spouse (if Separated)	DLG Office Use
4	Rent or First Mortgage Payment	\$	\$	\$
4a	Real Estate Taxes [] Already included above in #4	\$	\$	\$
4b	Insurance: Renter's or Homeowners [] Already included above in #4	\$	\$	\$
4c	Home maintenance, repairs, and upkeep expenses	\$	\$	\$
4d	Homeowner Association or Condo Dues	\$	\$	\$
5	Additional Mortgage Payments (2 nd Trust Deed, HELOC, etc)	\$	\$	\$
6a	Utilities: Electricity, heat, natural gas	\$	\$	\$
6b	Water, Sewer, Garbage Collection	\$	\$	\$
6c	Telephone, cell phone, internet, satellite, and cable	\$	\$	\$
6d	Utilities: Other	\$	\$	\$
7	Food and housekeeping supplies	\$	\$	\$
8	Childcare and children's education costs	\$	\$	\$
9	Clothing	\$	\$	\$
9a	Laundry and dry cleaning	\$	\$	\$
10	Personal Care Products and Services	\$	\$	\$
11	Medical and dental expenses	\$	\$	\$
12	Transportation (gas, maintenance, bus, train, but NOT including car payments)	\$	\$	\$
13	Entertainment, clubs, recreation, newspapers, magazines, and books	\$	\$	\$
14	Charitable contributions and religious donations	\$	\$	\$
15a	Insurance: Life (do not list if already deducted from paycheck)	\$	\$	\$
15b	Insurance: Health (do not list if already deducted from paycheck)	\$	\$	\$
15c	Insurance: Auto	\$	\$	\$
15d	Insurance: Other:	\$	\$	\$
16	Taxes (not deducted from wages or included in mortgage pymt)	\$	\$	\$
17a	Installment Payments: Auto 1	\$	\$	\$
17b	Installment Payments: Auto 2	\$	\$	\$
17c	Installment Payments: Other:	\$	\$	\$
17c	Installment Payments: Other:	\$	\$	\$
17c	Installment Payments: Other:	\$	\$	\$
18	Payments of Alimony, Maintenance, and Support (not deducted from paycheck)	\$	\$	\$
19	Payments for support of additional dependents not living at home	\$	\$	\$
20a	Other Real Estate: Mortgages, HELOCS, Liens	\$	\$	\$
20b	Other Real Estate: Real Estate Taxes	\$	\$	\$
20c	Other Real Estate: Property, Homeowner's or Renter's Insurance	\$	\$	\$
20d	Other Real Estate: Maintenance, repair, and upkeep expenses	\$	\$	\$
20e	Other Real Estate: HOA or Condo Dues	\$	\$	\$
21	Other Expenses: Student Loans	\$	\$	\$
21	Other Monthly Expenses:	\$	\$	\$
21	Other Monthly Expenses:	\$	\$	\$
22	TOTAL MONTHLY EXPENSES	\$	\$	\$

1. Are you aware of any critical deadlines (foreclosure, levy, lawsuit, repo, etc)? If so, provide documentation.
2. Is your Social Security Number and/or Tax ID a valid number issued to you by the government?
3. What state were you living in when your Social Security Number was issued?
4. What are your main goals in filing bankruptcy?
5. Are your creditors calling you, harassing you, or making threats?
6. Have you transferred or sold any assets in the last 2 years?
7. How much of a tax refund are you expecting this year?
8. Are you going to inherit anything of value soon?
9. Do you have any type of legal or potential claim/lawsuit against anyone (ie, Work comp, Car Accident, etc)?
10. Are you involved in any lawsuits as either a plaintiff or defendant?
11. Have you taken any Cash Advances from your creditors in the last 6 months?
12. Have you made any substantial purchases in the last 6 months?
13. Have you repaid any family members/friends in the last year?
14. Have you paid any creditors more than \$600 total within the last 90 days?
15. What is the main reason/s you fell behind with your debt obligations?
16. Do you want to eliminate your debt or restructure and pay?