

LASRIS, WALSH & ASSOCIATES, P.C.

Attorneys and Counselors at Law
Confidential Background Information

FINANCIAL PLANNING/BANKRUPTCY

Date: _____, 20____

Please Answer all Questions Completely

All information which you provide to us will be held in strictest confidence. If you feel uncomfortable about answering any question, please feel free to omit the answer. *If you feel you have been provided an incorrect form, please let the receptionist know.*

1. **Your Full Legal Name:** _____ Jr. Sr. _____ DOB _____

Address: _____ City: _____ State: _____ Zip: _____

Email address: _____ Cell Phone: _____

Home Phone: _____ Work Phone: _____

If military, branch of Service: _____ Home of Record: _____ SS# _____

2. **Spouse's Full Legal Name:** _____ Jr. Sr. _____ DOB _____

Address: _____ City: _____ State: _____ Zip: _____

Employer's Co g and Address: _____

Home Phone: _____ Work Phone: _____

If military, branch of Service: _____ Home of Record: _____ SS# _____

3. Marital Status (*Check one*): Single Married Separated Divorced Widowed

4. Children: Number: _____ Ages: _____

5. How did you learn of this Law Office? _____

6. Have you ever used an attorney before? Yes No Subject (optional): _____

PLEASE FILL OUT REVERSE SIDE ALSO. . . THANK YOU

A word about fees

Your attorney can quote you a fixed fee for standard services pertaining to the preparation and filing of standard bankruptcy paperwork. For other services associated with a bankruptcy filing (such as negotiations toward reaffirming debts, avoidance of liens, challenges to the granting of a discharge by a creditor or the trustee, etc.), fees are generally charged on a time basis. Fees quoted are representative of similar cases, but are nevertheless estimated and depend upon the amount of work involved to bring your case to a conclusion. This will be explained by your attorney and in your retainer agreement with your attorney.

After consulting with your attorney, if you find you do not need a lawyer or do not now wish to retain the lawyer with whom you consulted, you will be charged a \$75.00 consultation fee which is payable upon the conclusion of your visit. This information sheet and the attorney's notes will be retained for future use if you later decide to retain one of the Law Center's attorneys.

The following information will assist the attorney in evaluating your case
and in giving you the best advice for your situation.

Please List Your 5 largest Debts:

(will be used only for purposes of giving us a general idea of how much debt you owe)

Creditor's Name	Estimated Amount Owing
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

What is your income?

Gross: \$ _____ Net: \$ _____ Weekly Biweekly 2/Month Monthly
(check one)

If married, what is your spouse's income?

Gross: \$ _____ Net: \$ _____ Weekly Biweekly 2/Month Monthly
(check one)

Do you own or are you buying any real estate ? Yes No

If so, what is the home's estimated value? \$ _____

How much do you now owe on the home? \$ _____

Are you behind in your house payments? Yes No (If yes, _____ months behind)

Any other real estate (owned or purchased) within last 5 years? Yes No

If yes, please describe details: _____

Do you own or are you buying any automobiles? Yes / No

Yr/Make/Model: _____ Estimated Value \$ _____ Balance Due: \$ _____

Yr/Make/Model: _____ Estimated Value \$ _____ Balance Due: \$ _____

Are you behind in your automobile payments? Y N (If yes, _____ months behind)

Do you owe on any student loans? Yes No
