



# BANKRUPTCY INTAKE FORM

In order to make the best use of your time, we ask prospective clients to respond to the following questions. The information which we receive from you is used to evaluate your debt situation. The information will be kept confidential.

---

|       |        |      |
|-------|--------|------|
| First | Middle | Last |
|-------|--------|------|

---

|       |        |      |
|-------|--------|------|
| First | Middle | Last |
|-------|--------|------|

1. How long have you lived in Colorado? \_\_\_\_\_

2. How many people are in your household? \_\_\_\_\_

3. Do you own a home? Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, value of home: \$ \_\_\_\_\_  
Outstanding balance of all mortgages against the home (including 2<sup>nd</sup> or 3<sup>rd</sup> mortgage): \$ \_\_\_\_\_  
Are you behind on your home payments? Yes \_\_\_\_\_ No \_\_\_\_\_  
Is the house in foreclosure? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes what is the sale date: \_\_\_\_\_

Do you own any other real estate (land, time share, etc.)? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes please describe: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

4. Have any lawsuits been filed against you? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, by whom have these been filed? \_\_\_\_\_

5. Have your wages or bank account been garnished? Yes \_\_\_\_\_ No \_\_\_\_\_

6. What vehicles do you own, what is their current value, and how much do you owe on each vehicle?

|                   |                 |                         |
|-------------------|-----------------|-------------------------|
| 1. Vehicle: _____ | Value: \$ _____ | How much owed: \$ _____ |
| 2. Vehicle: _____ | Value: \$ _____ | How much owed: \$ _____ |
| 3. Vehicle: _____ | Value: \$ _____ | How much owed: \$ _____ |
| 4. Vehicle: _____ | Value: \$ _____ | How much owed: \$ _____ |

7. Do you owe any taxes? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, how much do you owe? \$ \_\_\_\_\_  
For what years do you owe taxes? \_\_\_\_\_  
Have you filed tax returns during each of the last three years? Yes \_\_\_\_\_ No \_\_\_\_\_

8. Do you owe or pay child support or maintenance? Yes \_\_\_\_\_ No \_\_\_\_\_  
Are you current? Yes \_\_\_\_\_ No \_\_\_\_\_ If not, how much do you owe in arrears? \$ \_\_\_\_\_

19. Do you have any student loans? Yes \_\_\_\_\_ No \_\_\_\_\_

10. What is your monthly take-home pay from your employer?  
\$ \_\_\_\_\_ Client #1  
\$ \_\_\_\_\_ Client #2

Do you have any other source of income (retirement, disability, unemployment, social security, child support, etc)?  
Yes: \_\_\_\_\_ No: \_\_\_\_\_ If yes please describe and list amount: \_\_\_\_\_

11. What are your total monthly expenses **not including credit cards and unsecured debts**? (Itemize on back if necessary) \$ \_\_\_\_\_

12. Do you now owe money to any family member, friend, or relative, or have you owed any such debts in the last four years? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes have you made any payments to that person in the last four years? \_\_\_\_\_

13. In the past four years have you transferred any money, personal property, or real property (land, home, etc) to any friend, family member, or associate (other than ordinary gifts)?

Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, specify: \_\_\_\_\_

14. Do you anticipate receiving any type of inheritance or property settlement in the next year (i.e., divorce settlement, personal injury settlement, worker's comp settlement, etc.)?

Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, specify: \_\_\_\_\_

15. Other than the real estate and vehicles listed above, do you have any other assets of significant value, other than standard household goods? For example: recreational vehicles, antiques, collectibles, heirlooms, stocks, bonds, accounts receivable, income from a trust, musical instruments, jewelry, firearms, tools, season tickets, etc.

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, specify type and value: \_\_\_\_\_

Other than real estate and vehicles, what is the most valuable item you own: \_\_\_\_\_

16. Have you incurred new debt (used credit card, taken a loan, cash advance, etc.) or made any balance transfers from one credit card to another in the past 90 days? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, specify: \_\_\_\_\_

17. Have you ever filed bankruptcy before? Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, when? \_\_\_\_\_

18. Are you now operating a business, or have you operated a business within the last six years?

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, what kind of business did you or are you operating? \_\_\_\_\_

19. How much do you owe on credit cards? \_\_\_\_\_

20. Do you have any other legal concerns you would like to discuss with an attorney?

Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, specify: \_\_\_\_\_

21. Do you presently have an attorney for any matter? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, what type of matter:

\_\_\_\_\_