

**CLIENT INFORMATION SHEET**

(Please fill out form completely)

DATE: \_\_\_\_\_

FULL NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ S.S.N.: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_ CELL NO: \_\_\_\_\_

PREVIOUS ADDRESSES FOR LAST 3 YEARS (INCLUDE DATE OF RESIDENCE):

\_\_\_\_\_  
\_\_\_\_\_

EMPLOYED BY: \_\_\_\_\_

EMPLOYER ADDRESS: \_\_\_\_\_

EMPLOYER PHONE NUMBER: \_\_\_\_\_

POSITION: \_\_\_\_\_ LENGTH OF EMPLOYMENT: \_\_\_\_\_

PREVIOUS EMPLOYER: \_\_\_\_\_

OTHER INCOME: \_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_ S.S.N.: \_\_\_\_\_

SPOUSE'S ADDRESS (if different) \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

SPOUSE EMPLOYED BY: \_\_\_\_\_

EMPLOYER ADDRESS: \_\_\_\_\_

POSITION: \_\_\_\_\_ LENGTH OF EMPLOYMENT: \_\_\_\_\_

PREVIOUS EMPLOYER: \_\_\_\_\_

OTHER INCOME: \_\_\_\_\_

CHILDREN'S NAMES AND  
AGES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PRIOR BANKRUPTCIES (?) YES: \_\_\_\_\_ NO: \_\_\_\_\_

If yes, list file No: \_\_\_\_\_ Location where filed: \_\_\_\_\_

Date of filing: \_\_\_\_\_ Chapter 7 or 13: \_\_\_\_\_

## PROPERTY INFORMATION

MORTGAGE HOLDER: \_\_\_\_\_  
MORTGAGE HOLDER ADDRESS: \_\_\_\_\_  
LOAN NO: \_\_\_\_\_ MONTHLY PAYMENT:\$ \_\_\_\_\_  
NUMBER OF MONTHS BEHIND \_\_\_\_\_ and(\$)BEHIND:\$ \_\_\_\_\_  
BALANCE ON MORTGAGE:\$ \_\_\_\_\_ VALUE OF PROPERTY:\$ \_\_\_\_\_  
ARE TAXES INCLUDED? \_\_\_\_\_ IS INSURANCE INCLUDED? \_\_\_\_\_  
Intention: ( ) Reaffirm ( ) Surrender ( ) Redeem (Catch up Payments)

2<sup>ND</sup> MORTGAGE HOLDER: \_\_\_\_\_  
MORTGAGE HOLDER ADDRESS: \_\_\_\_\_  
LOAN NO: \_\_\_\_\_ MONTHLY PAYMENT:\$ \_\_\_\_\_  
NUMBER OF MONTHS BEHIND \_\_\_\_\_ and(\$) BEHIND:\$ \_\_\_\_\_  
BALANCE ON 2<sup>ND</sup> MORTGAGE:\$ \_\_\_\_\_  
Intention: ( ) Reaffirm ( ) Surrender ( ) Redeem (Catch up Payments)

## CAR LOANS

1) CREDITOR \_\_\_\_\_  
CREDITOR ADDRESS \_\_\_\_\_  
CAR MAKE \_\_\_\_\_ MODEL \_\_\_\_\_ YEAR \_\_\_\_\_ MILEAGE \_\_\_\_\_  
MONTHLY PAYMENT \$ \_\_\_\_\_ BALANCE \$ \_\_\_\_\_  
PERCENTAGE RATE ON LOAN (%) \_\_\_\_\_  
EXTRA PKG.(example, leather, sunroof, etc... \_\_\_\_\_  
CO-DEBTOR \_\_\_\_\_  
Intention ( ) Reaffirm ( ) Surrender ( ) Redeem (catch up Payments)

2) CREDITOR \_\_\_\_\_  
CREDITOR ADDRESS \_\_\_\_\_  
CAR MAKE \_\_\_\_\_ MODEL \_\_\_\_\_ YEAR \_\_\_\_\_ MILEAGE \_\_\_\_\_  
MONTHLY PAYMENT \$ \_\_\_\_\_ BALANCE \$ \_\_\_\_\_  
PERCENTAGE RATE ON LOAN (%) \_\_\_\_\_  
EXTRA PKG. (example, leather, sunroof, etc... \_\_\_\_\_  
CO-DEBTOR \_\_\_\_\_  
Intention ( ) Reaffirm ( ) Surrender ( ) Redeem (Catch up Payments)

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AUTOMOBILE INSURANCE CARRIER \_\_\_\_\_  
AGENT \_\_\_\_\_  
AGENT'S ADDRESS \_\_\_\_\_

List all vehicles that you own that are paid for, make model, and year:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECURED LOANS**  
(Furniture, Appliances, etc.)

CREDITOR \_\_\_\_\_  
CREDITOR ADDRESS \_\_\_\_\_  
PROPERTY PLEDGED \_\_\_\_\_  
VALUE OF PROPERTY \$ \_\_\_\_\_ PERCENTAGE RATE ON LOAN (%) \_\_\_\_\_  
MONTHLY PAYMENT \$ \_\_\_\_\_ BALANCE ON LOAN \$ \_\_\_\_\_

Intention ( ) Reaffirm ( ) Surrender ( ) Redeem (Catch up Payments)

IF YOU HAVE MORE THAN ONE SECURED LOAN, LIST THEM BELOW

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MONTHLY BUDGET**  
**PLEASE LIST ALL EXPENSES ON A MONTHLY BASIS**

RENT OR MORTGAGE PAYMENT: \$ \_\_\_\_\_

UTILITIES:

ELECTRIC \$ \_\_\_\_\_

GAS \$ \_\_\_\_\_

WATER AND SEWER \$ \_\_\_\_\_

TELEPHONE \$ \_\_\_\_\_

CABLE \$ \_\_\_\_\_

INTERNET \$ \_\_\_\_\_

OTHER HOME COSTS \$ \_\_\_\_\_

HOME REPAIRS \$ \_\_\_\_\_

FOOD \$ \_\_\_\_\_

CLOTHING \$ \_\_\_\_\_

LAUNDRY \$ \_\_\_\_\_

MEDICAL \$ \_\_\_\_\_

DENTAL \$ \_\_\_\_\_

TRANSPORTATION (GAS & OIL) \$ \_\_\_\_\_

RECREATION	\$ _____
CHARITABLE CONTRIBUTIONS	\$ _____
HOME OWNER'S INS.	\$ _____
LIFE INSURANCE	\$ _____
HEALTH INSURANCE	\$ _____
AUTO INSURANCE	\$ _____
OTHER INSURANCE	\$ _____
TAXES	\$ _____
ALIMONY, CHILD SUPPORT AND MAINTENANCE PAID TO OTHERS	\$ _____
CHILD CARE	\$ _____
OTHER EXPENSES LIST _____	\$ _____
PAYMENTS FOR SUPPORT RECEIVED	\$ _____

**INCOME FOR 2 PRIOR YEARS: LIST \$ AMOUNT FOR EACH YEAR AND WHERE YOU WORK  
(LIST EACH PERSON SEPARATE IF FILING JOINT)**

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**BANK ACCOUNT AND BALANCES (BANK NAME)**

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**SUITS AND ADMINISTRATIVE PROCEEDINGS, EXECUTIONS,  
GARNISHMENTS AND ATTACHMENTS**

CASE TITLE \_\_\_\_\_

CASE NUMBER \_\_\_\_\_

COURT AND LOCATION \_\_\_\_\_

NATURE OF PROCEEDING \_\_\_\_\_

STATUS OF CASE \_\_\_\_\_

**PAYMENTS TO CREDITORS**

List all payments made during the last **90** days on loans, installments, purchases or other debts that add up to more than **\$600.00** for any one creditor. Include car and house.

1) CREDITOR & TOTAL AMOUNT PAID \_\_\_\_\_

2) CREDITOR & TOTAL AMOUNT PAID \_\_\_\_\_

3) CREDITOR & TOTAL AMOUNT PAID \_\_\_\_\_

**REPOSSESSIONS, FORCLOSURES AND RETURNS**

CREDITOR \_\_\_\_\_ LOAN NO. \_\_\_\_\_

ADDRESS \_\_\_\_\_

SEIZURE DATE \_\_\_\_\_

PROPERTY DESCRIPTION \_\_\_\_\_

VALUE \$ \_\_\_\_\_

**CREDIT CARDS**

**(Attach the most recent statements)**

CREDITOR NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

AMOUNT OWED \_\_\_\_\_

CREDITOR NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

AMOUNT OWED \_\_\_\_\_

CREDITOR NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

AMOUNT OWED \_\_\_\_\_

CREDITOR NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

AMOUNT OWED \_\_\_\_\_

CREDITOR NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
AMOUNT OWED \_\_\_\_\_

CREDITOR NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
AMOUNT OWED \_\_\_\_\_

### LEASES

Contract type ( ) Residential ( ) Vehicle ( ) Other \_\_\_\_\_  
DESCRIPTION \_\_\_\_\_  
TERMS \_\_\_\_\_  
LEASE COMPANY \_\_\_\_\_  
(Name and address) \_\_\_\_\_

### INCOME

ATTACH COPIES OF THE MOST RECENT CHECK STUBS.

### ASSETS

LIST ANY PERSONAL PROPERTY (bank accounts, retirement, 401K, etc.) that is worth more than  
**\$500.00**

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Please take a moment to let us know what method of advertisement helped you locate our office.

**PHONE BOOK**-Please circle the phone directory you use:

IMPACT

BELLSOUTH-DESOTO COUNTY

SUNSHINE PAGES

BELLSOUTH- GREATER MEMPHIS AREA

**FRIEND OR REFERRAL**-PLEASE TELL US WHO WE CAN THANK:

**NEWSPAPER**-PLEASE TELL US WHICH PAPER:

**OTHER**-PLEASE DESCRIBE:

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