

BANKRUPTCY CONSULTATION INTAKE SHEET

_____ Chapter 7 _____ Chapter 13

Client(s) name: _____

Filed any bankruptcies within 8 years for Ch. 7: _____ Yes _____ No

Filed any bankruptcies 2 years for Ch. 13: _____ Yes _____ No

Is client a current Maryland resident _____ Yes _____ No

If no, or moved out of state within 6 months, please provide dates of residency : _____

Family Size (including self for eligibility for Chapter 7): _____

Annual Income: Client: _____ Spouse: _____

Income must be under this amount to be eligible to file for a Chapter 7: Family of 1 - \$59,055 2 - \$77,105

3 - \$87,924 4 - \$107,233 5 - \$115,333 *Add \$8,100.00 in excess of 5 - for cases filed after 5/1/2014

Principal Real Estate: _____ Joint, Common or Sole

House Value: \$ _____ Are the mortgage payments current? _____ Yes _____ No

Arrears - how many months behind? _____ 1st Mortgage _____ 2nd Mortgage _____ HOA

Liens: _____ 1st Mortgage _____ 2nd Mortgage _____ Add'l Mort. Liens
_____ HOA

Pending F/C date: _____ Surrender _____ Retain

Can mortgage be stripped? _____ Yes _____ No - If yes, which lien? _____

Additional Real Estate/Time shares: _____

Individual's unsecured debts are less than \$383,175 and secured debts are less than \$1,149,525 - 11 U.S.C. § 109(e).

List Real property sold or transferred w/in 2 years & amt received: _____

Vehicle: _____ Surrender _____ Retain

Secured Liens: _____ Payoff date _____ Arrear Amt _____

Vehicle: _____ Surrender _____ Retain

Secured Liens: _____ Payoff date _____ Arrear Amt _____

List any other large assets or interests/stocks/bonds: _____

Inheritances: _____

Are taxes current? _____ Yes _____ No Tax Debts - State, amount, year: _____

Credit Card Debt - A: _____ B: _____ When did you last use your credit cards: _____

List the amount charged within 90 days \$ _____

TSP/401(k) Loan amt - _____ Loan Term - _____ Loan Payoff date - _____

Medical Bills - _____ Student Loans - _____

Any Claims: PI, Workman's comp: _____

Any pending court dates for judgments and when: _____

Quoted Attorney fee: _____ + Filing Fee of: Ch. 7 - \$335.00 or Ch. 13 - \$310.00

Whose Filing: Circle one – Husband Wife Joint Individual

Why are they filing bk: _____.