

INTERVIEW INFORMATION SHEET
 AFFILIATED LEGAL SERVICES, INC.
 4200 PERIMETER CENTER DRIVE SUITE 245
 OKLAHOMA CITY, OK 73112-2322
 PHONE 405 605 3704 FAX 405 601 0925
 E-Mail: affiliatedlegalservices@coxinet.net

How did you hear about us? Check all that apply.

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| <input type="checkbox"/> Verizon Yellow Pages | <input type="checkbox"/> Verizon Superpages.com | <input type="checkbox"/> Friend |
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| <input type="checkbox"/> Other _____ | | |
-

_____	_____
Full Name	E-Mail

_____	_____
Spouse's Full Name	E-Mail

_____	_____	_____
Street Address	City/State	Zip

_____	_____	_____
County	Cell Number	Spouse's Cell Number

_____	_____	_____
Home Phone Number	Work Number	Spouse's Work Number

_____	_____	_____
Occupation	How Long	Employed by

_____	_____	_____
Spouse's Occupation	How Long	Employed by

Do you own or have an interest in a business? _____. If so, list business name and location:

Have you ever filed bankruptcy before? _____ If so, how many times and when? _____

Do you have any dependents? _____. If so list their names, ages, and relationships. If any are not living with you, please check here _____.

Name	Age	Relationship	Name	Age	Relationship
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Name	Age	Relationship	Name	Age	Relationship
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NOTE: I advise you NOT to use any credit cards or incur any additional debt unless absolutely necessary if you intend to file for bankruptcy. Debts incurred after you consult a bankruptcy attorney could be non-dischargeable.

MAJOR ASSETS OTHER THAN HOME AND VEHICLES

Description	Value	Debt Owed	Keep/Return
Real Estate _____	_____	_____	_____
Furniture _____	_____	_____	_____
Jewelry _____	_____	_____	_____
Antiques, etc. _____	_____	_____	_____
IRA _____	_____	_____	_____
Retirement _____	_____	_____	_____
Insurance _____	_____	_____	_____
Stocks/Bonds _____	_____	_____	_____
Business _____	_____	_____	_____
Cash/Checking/ Savings Accts. Savings \$ _____ Checking \$ _____	Cash on Hand \$ _____		

How often are you paid?

SELF: Weekly Bi-Weekly Twice Monthly Monthly

SPOUSE: Weekly Bi-Weekly Twice Monthly Monthly

Average Income Per Pay Period:

	Self	Spouse		Self	Spouse
Gross wages, salary	_____	_____	Worker's Comp	_____	_____
Estim Overtime	_____	_____	Other Income	_____	_____
SS Benefits	_____	_____	Describe _____		
Child Support	_____	_____	Total Gross Income	_____	_____

Payroll Deductions

FIT, SS, FICA			Retirement	_____	_____
Medicare	_____	_____	401(k) loan	_____	_____
Insurance	_____	_____	Other(_____)	_____	_____
			Total Deduct	_____	_____

Self Spouse

Total Monthly Net Income _____ + _____ = _____

Note: If paid bi-weekly, to obtain monthly income, multiply 1 paycheck by 26 then divide by 12.

AVERAGE MONTHLY LIVING EXPENSES

Do not include credit card payments.

Rent/Home Mortgage	\$ _____	Car/Truck Payments	\$ _____
Taxes Included <input type="checkbox"/>		Recreation	\$ _____
Insurance <input type="checkbox"/>		Subscriptions/Reading	\$ _____
Property Taxes (not included)	\$ _____	Charitable Contributions	\$ _____
Home Insurance	\$ _____	Child Support/Alimony	\$ _____
Life Insurance (not wage deducted)	\$ _____	School Expenses	\$ _____
Auto Insurance	\$ _____	Child Care Expenses	\$ _____
Home Association Dues	\$ _____	Student Loans	\$ _____
Home Maintenance	\$ _____	Business Expenses	\$ _____
Electricity	\$ _____	Self Employment Taxes	\$ _____
Gas Heat	\$ _____	IRS Payments	\$ _____
Water/Sewer/Trash	\$ _____	Pet Care	\$ _____
Cable/Internet	\$ _____	Other (_____)	\$ _____
Telephone (include cell/pager)	\$ _____	Other (_____)	\$ _____
Food	\$ _____		
Clothing	\$ _____	TOTAL	\$ _____
Grooming	\$ _____		
Laundry/Dry Cleaning	\$ _____	Combined Net Income	\$ _____
Medical Dental	\$ _____	Less Expenses	\$ _____
Transportation	\$ _____	Total Disposable Income	\$ _____

(gas, oil, maintenance, etc.)

Are you expecting to receive a tax refund? _____ If yes, how much? _____

If you owe taxes , please complete:

Year: _____ Owed: \$ _____ Kind: (income, property, etc.) _____
 Date return filed: _____ Is a tax lien filed? _____

Year: _____ Owed: \$ _____ Kind: (income, property, etc.) _____
 Date return filed: _____ Is a tax lien filed? _____

Do you have an installment agreement with the IRS? _____ If yes, what is your monthly payment?
 \$ _____ Are you current? _____ Months in default? _____

Did you submit an offer in compromise? _____? Date Submitted? _____ Date rejected/withdrawn? _____

If any tax returns were audited, please give years audited and date of any assessments:

Tax years audited: _____

PLEASE ANSWER EACH OF THE FOLLOWING QUESTIONS

Yes No

___ ___ Are any car repossessions currently pending against you?

___ ___ Are any of your past/present real estate notes guaranteed by the FHA/VA or any other guarantor?

___ ___ Have you sold/transferred any item over \$500 in the past 5 years? Describe: _____

___ ___ Have you ever assumed real estate from someone, or has anyone ever assumed real estate from you?

___ ___ Have you ever been divorced? If yes, give years of divorce: _____

___ ___ Have you been ordered to pay any debts/support payments under a divorce/separation agreement?

___ ___ Have you co-signed any loans? Explain _____

___ ___ Have you made any non-deductible contributions to an IRA? THESE MAY NOT BE EXEMPT

___ ___ Have you pledged any household goods to a finance company?

___ ___ Do you have any student loans, or are you a guarantor on someone else's student loan? Amount: \$ _____

NOTE: Most student loans are not dischargeable in bankruptcy.

___ ___ Do you now or ever have owned a business? If yes, briefly explain: _____

___ ___ Have you ever been convicted of a felony or are you currently on probation, parole, or the subject of any criminal accusations or indictments? If Yes, briefly explain (Criminal Restitution is not dischargeable)

___ ___ Could you sue anyone and collect any money? (e.g. Personal Injury)

___ ___ Is there a chance you could be entitled to inheritance within the next 6 months?

___ ___ Have you received any cash advances from your credit cards in the past 6 months?

List amount and approximate date of each: _____

___ ___ Did you purchase any item over \$250 in the past 6 months? Describe, giving approximate date of purchase:

___ ___ Have you transferred the balance of one credit card account to another within the past 9 months?

List amount and approximate date of each transfer: _____

___ ___ Do you have any overdue child support/alimony payments? Amount: _____

___ ___ Are you and/or your spouse's wages under garnishment at this time? Explain: _____

___ ___ Did you ever work with a credit counseling agency? Name of agency: _____

Briefly describe the reasons for your current financial situation: _____

