

INTAKE FORM

YOUR FULL NAME _____ TODAY'S DATE: _____

Social Security # _____ Date of Birth: _____

HOW DID YOU HEAR ABOUT US? _____ I am a current client (Please update your information below)

_____ I am a prior client of Marshall Entelisano _____ I am a prior client of Camron Law (Rod Shirley)

I was referred by: _____

OR CHOOSE ONE: _____ Website _____ Google _____ Yellow Pages _____ Yellow Book _____ Pioneer Book
_____ Black Belt Book _____ Ad Letter _____ Billboard _____ Walk-in _____ TV

A. Your Information Address _____

_____ Street _____ City _____ Zip

County: _____ Mailing address if different: _____

List all phone numbers: **CELL** _____ **HOME** _____ **WORK** _____

(Circle the best phone number to call)

E-mail address: _____

Name and Phone Number of alternate contact: _____

Other names used in the last 8 years _____

Including yourself, how many live in your household? _____

Marital Status (Circle One) SINGLE MARRIED SEPARATED WIDOWED DIVORCED

If divorced, when? _____

** Fill out this section only if married and you are considering filing a joint case**

B. Spouse's Full Name _____ **S.S.#** _____

Date of Birth: _____

Address (fill out only if different) _____ County _____

Have you used a different name in the last 8 years? _____ No _____ Yes: _____

List all phone numbers: **CELL** _____ **HOME** _____ **WORK** _____

(Circle the best phone number to call) E-mail address: _____

Name and number of alternate contact: _____

COMMUNICATING WITH YOU: I authorize the firm, its officers, directors, employees, agents, and assigns to communicate with me and the listed alternate contact persons using the U.S. Mail, e-mail, cell phones (including text and voice mail), answering machines, facebook, twitter, and any other electronic means of devices. I understand that communication between the firm and me by any method is not secure and may be intercepted or received by someone other than the intended party. I understand that otherwise confidential and potentially privileged communication may be disclosed to unintended parties and that this firm has no control over such communication or its dissemination to unintended parties. I expressly hold harmless and release the firm, its officers, directors, employees, agents, and assigns from any and all liability related thereto or resulting therefrom. I authorize the law firm of Marshall A. Entelisano, P.C. to use my electronic signature on all pleadings and other documents necessary or helpful to my bankruptcy case.

Signature: _____ **Spouse's Signature:** _____

OFFICE USE ONLY:

Notes/ER/Reason _____ Chapter 7 Chapter 13 Single Joint

PLEASE CHECK EACH BOX AS APPROPRIATE

1. Have you lived at your current address at least two years? Yes No
2. Do you have an interest in an **Educational** Individual Retirement Account? Yes No
3. Do you have an interest in a **Qualified State Tuition Program**? Yes No
4. Do you have an ownership interest in any real estate – buying, jointly owned with a spouse or others, inherited, etc. in which your name is on a Deed? Yes No
5. Do you have your name on a checking account? Yes No
6. Do you have your name on a savings account? Yes No
7. Do you have your name on a safe deposit box or access to a safe deposit box? Yes No
8. Do you have your name on any other type of financial or banking account? Yes No
9. Do you owe any money to any bank, credit union or other financial institution in which you maintain a checking, savings, safe deposit box, certificates of deposit, or other financial accounts? Yes No
10. Are you the beneficiary of a trust fund whereby you receive money or property from a trust account? Yes No
11. Have you received an inheritance within the last 12 months? Yes No
12. Do you anticipate receiving an inheritance within the next six months? Yes No
13. Do you own any stocks, bonds, or annuities (other than in a retirement account)? Yes No
14. Do you have an ownership interest in a retirement account? Yes No
15. Do you currently have an ownership interest in a business (sole proprietorship, corporation, limited liability company, partnership, joint venture, or other type)? Yes No
16. During the last six years, have you had an ownership interest in a business (sole proprietorship, corporation, limited liability company, partnership, joint venture, or other type)? Yes No
17. Have you had anything repossessed in the last twelve months? Yes No
18. Have you had any real estate foreclosed on in the last twelve months? Yes No
19. Have you transferred (sold, conveyed, gifted, deeded, exchanged, etc.) any real estate out of your name in the last three years? Yes No
20. Have you transferred (sold, gifted, exchanged, etc.) any other asset or personal property out of your name in the last year? Yes No
21. Do you owe any money on any furniture, furnishings, electronic equipment or appliances that you are buying (Do not include rented items)? Yes No
22. Have you used any personal property (other than a vehicle) as collateral for a loan? Yes No
23. Do you have a vehicle titled in your name (one you purchased, own, or co-signed on) that you owe money on or that is paid for? Yes No
24. Do you have a mobile home titled in your name (one you purchased, own, or co-signed on) that you owe money on or that is paid for? Yes No
25. Are you currently suing anyone for money damages (do not include any divorce action)? Yes No
26. Do you believe that you could sue someone for money damages? Yes No
27. Are you involved in a class action lawsuit? Yes No
28. Have you co-signed for anybody to get a loan of any type (for furniture, vehicle, etc.)? Yes No
29. Do you have an ownership interest in any airplane, boat, motorcycle, 4-wheeler, RV (camper, travel trailer, 5th wheel, motor-home), or other recreational vehicles? Yes No
30. Do you have an ownership interest in any livestock (DO **NOT** count pets)? Yes No
31. Do you have an ownership interest in anything that has value as a collectible? Yes No
32. Do you have a legal obligation to pay **current** child support? Yes No
33. Do you owe any child support **arrearage** (back child support)? Yes No
34. Are you liable for a student loan, regardless of whether payments are deferred? Yes No
35. Have you filed each federal income tax return in the last four years? Yes No

- 36. Have your wages or bank account been garnisheed or levied in the last ninety days? Yes No
- 37. Are you currently being sued by anyone (other than a divorce proceeding)? Yes No
- 38. Is any creditor threatening to repossess your vehicle or other personal property? Yes No
- 39. Is any creditor threatening to foreclose on your home or other real estate? Yes No
- 40. Do you owe any money for any cash advance or pay-day loans? Yes No
- 41. Do you owe any money for a bad check? Yes No
- 42. Is any utility company (Alabama Power, Alagasco, Water, etc.) threatening to cut off your service for non-payment? Yes No

43. Please check your current marital status:
- Single (never been married) Divorced Widow/Widower
 - Married and living together Separated (married, but living at separate addresses)

44. How many people other than you (and your spouse, if married and living together) live in your home? _____

45. Please list an approximate **AVERAGE** monthly cost for the following expenses **(if not applicable, leave blank)**:

- A. Mortgage Payment (include the amount for insurance and taxes)....._____
- B. Rent....._____
- C. Lot Rent....._____
- D. Electric....._____
- E. Heating Gas....._____
- F. Water and Sewer....._____
- G. Trash....._____
- H. Home Phone....._____
- I. Cell Phone....._____
- J. Cable or Satellite....._____
- K. Groceries....._____
- L. Clothing....._____
- M. Medical (out-of-pocket expenses NOT covered by insurance)....._____
- N. Vehicle Gas (per month)....._____
- O. Homeowner's Insurance (if paid separately from the mortgage payment)....._____
- P. Vehicle Insurance....._____
- Q. Life or other insurance....._____
- R. Child Support....._____
- S. Alimony....._____
- T. Property Taxes (if paid separately from the mortgage payment)....._____
- U. Other regular monthly expenses....._____

I attest that the answers to the foregoing questions are true and accurate to the best of my information, knowledge, and belief.

Signature – Debtor

Date

Signature – Co-Debtor

Date

DOCUMENTS AND INFORMATION WE NEED FOR YOUR APPOINTMENT

- Driver's License or Picture ID.
- Social Security Card.
- Pay Stubs or Proof of Income for the last 60 days (2 months).
- Pay Stubs or Proof of Income for the last 60 days (2 months) for Spouse.
- Federal Tax Return for 2014, if you are required to file.
- Any bills you have for: Medical, Credit Cards and Pay Day Loans.
- Mileage and Proof of Insurance (Declaration Page) on Vehicle(s).