



230 East Fulton Street
Grand Rapids, Michigan 49503

**CONFIDENTIAL
DEBT RELIEF INTAKE FORM**

Please complete entire form.

PLEASE PRINT

Date: _____

GENERAL INFORMATION

1. Why did you choose our firm? _____
 2. Were you referred to our office? _____ By whom? _____
 3. Your Name: _____ S.S. # _____
 4. Your Birth Date: _____
 5. Spouse's Name: _____ S.S. # _____
 6. Spouse's Birth Date: _____
 7. Your prior name(s): _____
 8. Current Address: _____
-
10. County: _____
 11. Prior addresses (within last two years): _____
-
12. Work Phone: _____ Home Phone: _____
 13. Cell Phone: _____ Email: _____
 14. Dependents (names and ages): _____
-

YOUR EMPLOYMENT *

Employer's Name: _____

Address: _____

Your Job Description: _____

Length of Time on Job: _____

Hourly Wage: \$ _____ Pay Frequency: _____

Average Hours Worked Per Pay Period: _____

Take Home Pay Per Pay Period: \$ _____

Additional Income: \$ _____ Source: _____

How much did you make in: 2015 - \$ _____ (year to date)

2014 - \$ _____

2013 - \$ _____

SPOUSE'S EMPLOYMENT *

Employer's Name: _____

Address: _____

Spouses Job Description: _____

Length of Time on Job: _____

Hourly Wage: \$ _____ Pay Frequency: _____

Average Hours Worked Per Pay Period: _____

Take Home Pay Per Pay Period: \$ _____

Additional Income: \$ _____ Source: _____

How much did you make in: 2015 - \$ _____ (year to date)

2014 - \$ _____

2013 - \$ _____

* If self-employed, please fill out the business expense sheet as well.

RELATED INFORMATION

- | | | | |
|-------|--|-------|----|
| 1. | Have you been divorced? If yes, what year? | YES | NO |
| <hr/> | | | |
| 2. | Have you, your spouse, or any member of your family been injured or involved in an automobile or any other type of accident in the last three years? | YES | NO |
| 3. | Are there any pending lawsuits that you have filed against another party? | YES | NO |
| 4. | Do you or your spouse presently have an interest in the estate of anyone who is deceased? | YES | NO |
| 5. | Do you have any living relative or friend who you think might die in the next six months and leave you something? | YES | NO |
| 6. | Have you at any time within the past two years been engaged in business for yourself? (This does not mean working for someone else.) | YES | NO |
| 8. | Have you received your 2014 income tax refunds? | YES | NO |
| a. | If so, how much? | <hr/> | |
| b. | If not, how much are you expecting? | <hr/> | |
| c. | Are you owed any previous year's refund? | YES | NO |
| 9. | Do you owe any money to the Internal Revenue Service or the State of Michigan? | YES | NO |
| 10. | Are your wages currently being garnished? By whom? | YES | NO |
| 11. | How much has been garnished from your wages in the last 90 days? | YES | NO |
| 12. | Have you made any voluntary payments totaling more than \$600.00 to any single creditor within the last 90 days? | YES | NO |
| 13. | Have you repaid any family members or friends any money in the last year? | YES | NO |
| 14. | Do you own a vehicle? | YES | NO |
| 15. | If you make payments on your vehicle, are you current? | YES | NO |
| 16. | Have you had any items repossessed within the last year? | YES | NO |

- | | | | |
|-----|--|-------|----|
| 17. | If yes, what was repossessed? | <hr/> | |
| 18. | Have you filed a prior bankruptcy? | YES | NO |
| 19. | Do you own real estate/house? | YES | NO |
| 20. | Are you current on payments? | YES | NO |
| 21. | Is a foreclosure sale scheduled? When? | YES | NO |
| 22. | Have you refinanced your home in the past year? | YES | NO |
| | If yes, how much cash was received? | <hr/> | |
| 23. | Does your name appear on a Deed to anyone else's property? | YES | NO |
| 24. | Are you a part of a Family Trust or are you a part of a Trust for yourself? | YES | NO |
| 25. | Have you transferred any property in or out of your name in the last four years ? For example, your home or a car. | YES | NO |
| 26. | Have you taken a cash advance on any of your credit cards within the past year? | YES | NO |
| | a. If yes, how much? | <hr/> | |
| 27. | Have you transferred any credit card balances to a different credit card within the past year? | YES | NO |
| 28. | Have you used any credit cards at all in the last 3 months? | YES | NO |
| 29. | Do you have a student loan? | YES | NO |
| | a. If yes, what is the balance? | <hr/> | |
| 30. | Have you gambled in the past 2 years? | YES | NO |
| | a. If yes, have you reported any winnings or losses on your income tax returns? | YES | NO |
| | b. If yes, how much? (indicate whether winnings or losses) | <hr/> | |
| 31. | Are there any pending lawsuits against you? | YES | NO |
| 32. | Do you owe the Bank where your checking and/or savings account is held any money? i.e. Overdraft account? Vehicle loans? Credit cards? | YES | NO |
| 33. | Are you on any bank account with anyone other than your Spouse? | YES | NO |