

## General Client Intake Questions

1			How long have you continually lived in the State of Texas? _____
2	Y	N	Do you have any dependant's Living at home? If yes, lest their names and ages. _____
3	Y	N	Are you behind on child support or alimony? If YES, how much do you owe?
4	Y	N	How much are your monthly court ordered support or alimony payments?
5	Y	N	Have you ever filed bankruptcy? If Yes, when _____. Where: _____. Did you receive a discharge? _____. Date: _____
6	Y	N	Have you transferred property to anyone in the past two years? (Transfer means to sell, give, or trade any real or personal property to any person or entity)
7	Y	N	Is there anyone who has or could sue you? If YES, who: _____, Why: _____
8	Y	N	Is there anyone you could sue for money damages? If YES, who: _____. Why: _____
9	Y	N	Does anyone owe you money? If Yes, who: _____. Why: _____
10	Y	N	Do you have any personal injury claims? If YES, against whom: _____. For what reason: _____
11	Y	N	Are you a sole proprietor of a business (you own an interest in a business that is not a corporation)? If YES, what is the cost of your existing inventory? _____.
12	Y	N	Are you presently the beneficiary of a trust or estate?
13	Y	N	Are both of your parents living?
14	Y	N	If both parents are NOT living, is there any property in their estate that has not been distributed?
15	Y	N	If one or both of your parents has passed away, did he/she have a will?
16	Y	N	Is anyone in possession of anything you own or have a claim to? If YES, what is the property? _____. Why are they holding it? _____
17	Y	N	Do you owe any money or property to any family or friends? _____ If YES, to whom? _____. How much: _____.
18	Y	N	Have you made any payments to any family or friends within the last year? If YES, how much: _____. When: _____.
19	Y	N	Have you charged, taken a cash advance, or written a convenience check for more than \$1,000.00 to any single creditor within the last six (6) months? If YES, how much: _____, When: _____. What is the payoff to that creditor? _____
20	Y	N	Do you own, or have any interest in ANYTHING, <u>other than</u> your home, the contents of your home, your vehicles, tools of your trade and your retirement acccounts?
21	Y	N	In the last seven (7) months have you received money, financial assistance, investment income, (including withdrawals from IRAs or 401ks), pension retirement income or from any other source? If YES, from what source? _____. In what form? _____ . How much? _____.
22	Y	N	Do you owe any money (credit cards, signature loans, lines of credit etc.) to the bank in which you have your checking or savings account?
23	Y	N	Are you listed on any checking or savings account that is not yours?
24	Y	N	Have you made any payments on your home from any other source other than your source of income in the last 10 years? If YES, where did the funds come from ? _____. How much did you pay? _____.
25	Y	N	Do you contribute or pay for care and/or support of an elderly, chronically ill, or disabled member of your household or a member of your immediate family who is unable to pay for such expenses? If YES, please explain and state how much is paid on a monthly basis. _____ _____