

FOR DLF OFFICE USE: [] R [] HL [] NQ	Ch [] 7 [] 13 [] 11	Total Fees: \$	IC Staff:	Office:
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► **CONFIDENTIAL INTAKE FORM** *The information you provide will remain strictly confidential. Please provide your best estimates.*

Today's Date	Is this your first bankruptcy consultation? [] Yes [] No	Filed bankruptcy before? [] No [] Yes If Yes, what Chapter? [] 7 [] 13 [] 11 If Yes, what month and year did you file?
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► **DEBTOR CONTACT INFORMATION**

JOINT-DEBTOR (SPOUSE) CONTACT INFORMATION [] None

Your First Name Middle Last	Spouse's First Name Middle Last
Street Address (Residence)	Street Address (Residence) [] Same as Spouse
City State Zip	City State Zip
Home Phone Cell Phone Work Phone	Home Phone Cell Phone Work Phone
Email Address What State did you live in 2 years ago?	Email Address What State did you live in 2 years ago?
Social Security No Date of Birth	Social Security No Date of Birth
Marital Status [] Single [] Married [] Divorced [] Widow	No of Dependents Marital Status [] Single [] Married [] Divorced [] Widow

► **DESCRIBE HOW YOU HEARD ABOUT US**

[] Personal Referral [] Internet [] Printed Ad [] Radio [] TV [] Seminar [] Webinar [] Other:
If you were referred to DLF by a friend, family member, attorney, etc, we would like to personally thank them. Please provide their contact info below:

Referring Person's Name	Referring Person's Phone	Referring Person's Email Address
Referring Person's Mailing Address	Referring Person's City	State Zip

► **REAL ESTATE** [] None *If more than 1, attach additional pages.*

[CH 13 DEBT LIMITS: D: \$1,081,400 E/F: \$360,475]

Description	Present Value \$	Basis of Value	Yr Purchased	Purchase Price \$	Homestead? [] Yes [] No	Property Intentions [] Keep [] Sell [] Surrender
<i>Estimate if Unknown</i>	<i>Balance Owed</i>	<i>Monthly Payment</i>	<i># Months Late</i>	<i>Amt to Reinstate</i>	<i>Notice of Default Date</i>	<i>How is Title Held?</i>
First Mortgage	\$	\$		\$		[] Individual [] Joint [] Other
Second Mortgage	\$	\$		\$		
Third Mortgage	\$	\$		\$		
Association Dues	\$	\$		\$		
Property Taxes	\$	\$		\$		
Judgment Liens	\$	\$		\$		
Other Liens	\$	\$		\$		

► **VEHICLES, MOTORCYCLES, BOATS, RECREATIONAL VEHICLES** *List all, whether paid for or not.*

Yr	Make	Model	Current Value	Loan or Lease	Payment	Balance	Mo's Late	Intent
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender
			\$	[] Loan [] Lease [] Paid	\$	\$		[] Keep [] Surrender

► **OTHER CREDITORS**

<i>Provide your best estimates. In the event you retain DLF for bankruptcy, we will pull your credit report.</i>		Approx # Items	Approx total combined balances	Approx total charges in last 6 months	Approx total pmts in last 6 months	Did anyone cosign?	Months Late
1	Credit Cards (Visa, MC, Amex, Discover, etc)		\$	\$	\$	[] Yes [] No	
2	Dept Store Cards (Best Buy, Sears, Macy, etc)		\$	\$	\$	[] Yes [] No	
3	Personal Loans (Payday, Credit Union, etc)		\$	\$	\$	[] Yes [] No	
4	Loans from Family/Friends		\$	\$	\$	[] Yes [] No	
5	Auto Repo Deficiency		\$	\$	\$	[] Yes [] No	
6	Lawsuits/Judgments		\$	\$	\$	[] Yes [] No	
7	Foreclosure Deficiencies		\$	\$	\$	[] Yes [] No	
8	Student Loans		\$	\$	\$	[] Yes [] No	
9	Child/Domestic Support Obligations		\$	\$	\$	[] Yes [] No	
10	Taxes for Years:		\$	\$	\$	[] Yes [] No	
11	Medical Bills		\$	\$	\$	[] Yes [] No	
12	Lien Strip 1 (2 nd Mortgage, Judgment Lien, etc)*		\$	\$	\$	[] Yes [] No	
13	Lien Strip 2 (3 rd Mortgage, Judgment Lien, etc)*		\$	\$	\$	[] Yes [] No	
14	Other:		\$	\$	\$	[] Yes [] No	
15	Other:		\$	\$	\$	[] Yes [] No	
16	Other:		\$	\$	\$	[] Yes [] No	
GRAND TOTAL			\$	\$	\$		

► **RETIREMENT & OTHER VALUABLE ASSETS**

Asset Description	Value	Asset Description	Value
1 Retirement	\$	8 Other:	\$
2 401K	\$	9 Other:	\$
3 Pension	\$	10 Other:	\$
4 IRA	\$	11 Other:	\$
5 Annuity	\$	12 Other:	\$
6 Checking & Savings Accounts	\$	13 Other:	\$
7 Inheritance (Wills, Trusts, etc)	\$	14 Other:	\$

► **DLF IC STAFF NOTES**

► **GROSS INCOME FROM ALL SOURCES** *Including Work, SSI, Domestic Support, Retirement, Pension, Royalties, etc.*

Occupation	2009 Gross Income \$	2010 Gross Income \$	2011 Gross Income YTD \$	Ave Mo Pay Before Tax \$	Ave Mo Pay After Tax \$
Occupation of Spouse	2009 Gross Income \$	2010 Gross Income \$	2011 Gross Income YTD \$	Ave Mo Pay Before Tax \$	Ave Mo Pay After Tax \$

[MEDIAN INCOME 1) \$3,997 2) \$5,387 3) \$5,887 4) \$6,600 5) \$7,225 6) \$7,850 7) \$8,475 8) \$9,100]

► **AVERAGE MONTHLY LIVING EXPENSES**

Expense Category		Debtor(s)	Spouse (if Separated)	DLF Office Use Only
1	Rent or Total Mortgage Payment	\$	\$	\$
1a	Property Taxes [] Included in No 1	\$	\$	\$
1b	Insurance: Renter's or Homeowners [] Included in No 1	\$	\$	\$
2a	Utilities: Electric Bill	\$	\$	\$
2a	Utilities: Natural Gas Bill	\$	\$	\$
2b	Utilities: Water & Sewer	\$	\$	\$
2c	Utilities: Telephone [] Home [] Cell [] Both	\$	\$	\$
2d	Utilities: Cable/Satellite	\$	\$	\$
2d	Utilities: Internet	\$	\$	\$
2d	Utilities: Other	\$	\$	\$
2d	Utilities: Other	\$	\$	\$
3	Home maintenance (repairs, upkeep, pool, yard, etc)	\$	\$	\$
4	Food	\$	\$	\$
5	Clothing	\$	\$	\$
6	Laundry and dry cleaning	\$	\$	\$
7	Medical and dental expenses	\$	\$	\$
8	Transportation (not including car payments)	\$	\$	\$
9	Recreation, entertainment, subscriptions, etc	\$	\$	\$
10	Charitable contributions	\$	\$	\$
11b	Insurance: Life	\$	\$	\$
11c	Insurance: Health	\$	\$	\$
11d	Insurance: Auto	\$	\$	\$
11e	Insurance: Other	\$	\$	\$
12	Taxes (not deducted from wages or included in mortgage pymt)	\$	\$	\$
13a	Installment Payments: Auto 1	\$	\$	\$
13a	Installment Payments: Auto 2	\$	\$	\$
13a	Installment Payments: Auto 3	\$	\$	\$
13b	Installment Payments: Other	\$	\$	\$
13c	Installment Payments: Other	\$	\$	\$
13d	Student Loan Payment	\$	\$	\$
14	Alimony, maintenance, and support paid to others	\$	\$	\$
15	Payments for support of additional dependents not living at home	\$	\$	\$
16	Regular recurring business expenses for self employed (provide P&L)	\$	\$	\$
17a	Other: Daycare	\$	\$	\$
17b	Other	\$	\$	\$
17c	Other	\$	\$	\$
17d	Other	\$	\$	\$
TOTAL AVERAGE MONTHLY EXPENSES		\$	\$	\$

1. Are you aware of any critical deadlines (foreclosure, levy, lawsuit, repo, etc)? If so, provide documentation.
2. Is your Social Security Number and/or Tax ID a valid number issued to you by the government?
3. What state were you living in when your Social Security Number was issued?
4. What are your main goals in filing bankruptcy?
5. Are your creditors calling you, harassing you, or making threats?
6. Have you transferred or sold any assets in the last 2 years?
7. How much of a tax refund are you expecting this year?
8. Are you going to inherit anything of value soon?
9. Do you have any type of legal or potential claim/lawsuit against anyone (ie, Work comp, Car Accident, etc)?
10. Are you involved in any lawsuits as either a plaintiff or defendant?
11. Have you taken any Cash Advances from your creditors in the last 6 months?
12. Have you made any substantial purchases in the last 6 months?
13. Have you repaid any family members/friends in the last year?
14. Have you paid any creditors more than \$600 total within the last 90 days?
15. What is the main reason/s you fell behind with your debt obligations?
16. Do you want to eliminate your debt or restructure and pay?