

NEW CLIENT QUESTIONNAIRE

The purpose of the next few pages is to get very general information about your finances in order to get a snapshot of your case. We do not need detailed or exact information at this time, we will get that later. Please answer the questions as best as you can.

ALL ANSWERS WILL BE CONSIDERED CONFIDENTIAL

1. Do you own or are you buying home? Yes No

If yes...

1st mortgage monthly payment \$ _____

How many months behind _____

2nd Mortgage or Home Equity Line on home? Yes No

If yes...

What is monthly payment \$ _____

How many months behind _____

Association Dues or Fees? Yes No

If yes...

What is monthly payment \$ _____

How many months behind _____

Are Taxes and Insurance part of the mortgage payment? Yes No

Who is on the title to the property? _____

Intentions - Do you plan on keeping your home? Yes No

2. Do you own any other land or homes? Yes No

If yes...

1st mortgage monthly payment \$ _____ How many months behind _____

2nd mortgage or Home Equity Line on Property? Yes No

If Yes...

What is monthly payment \$ _____

How many months behind _____

Association Dues or Fees? Yes No

If yes...

What is monthly payment \$ _____

How many months behind _____

Are Taxes and Insurance part of the mortgage payment? Yes No

Who is on the title to the property? _____

Intentions - Do you plan on keeping your property? Yes No

3. Do you own or are you buying any cars or trucks? Yes No

If yes...

Year _____ Make _____ Model _____

If paid for, how many miles? _____

If not, monthly payment of \$ _____ for _____ years.

If not current, behind by _____ months

Who is on the title to the vehicle? _____

Additional Vehicles? Yes No

If yes...

Year _____ Make _____ Model _____

If paid for, how many miles? _____

If not, monthly payment of \$ _____ for _____ years.

If not current, behind by _____ months

Who is on the title to the vehicle? _____

Year _____ Make _____ Model _____

If paid for, how many miles? _____

If not, monthly payment of \$ _____ for _____ years.

If not current, behind by _____ months

Who is on the title to the vehicle? _____

Year _____ Make _____ Model _____

If paid for, how many miles? _____

If not, monthly payment of \$ _____ for _____ years.

If not current, behind by _____ months

Who is on the title to the vehicle? _____

**4. Do You Own or Are You Buying Any Motorcycles,
RV's Boats, ATVs? Yes No**

If yes...

Year _____ Make _____ Model _____

If paid for, how many miles? _____

If not, monthly payment of \$ _____ for _____ years.

If not current, behind by _____ months

Who is on the title to the vehicle? _____

5. Do you owe Federal Taxes? Yes No

If yes, what years and amount? _____

6. Do you have Student Loans? Yes No

If yes, what is their status? _____

7. How much is your unsecured debt (debt without collateral), such as credit cards, medical bills, personal loans, ect.

- | | |
|---|---|
| <input type="checkbox"/> \$ 0 to \$5,000 | <input type="checkbox"/> \$30,000 to \$50,000 |
| <input type="checkbox"/> \$5,000 to \$15,000 | <input type="checkbox"/> 50,000 to \$100,000 |
| <input type="checkbox"/> \$15,000 to \$30,000 | <input type="checkbox"/> over \$100,000 |

8. Have you had any Repossessions or Foreclosure in the last 5 years?

- Yes No

9. Are there any Lawsuits currently pending?

- Yes No

10. Are your Wages being Garnished?

- Yes No

11. How long have you lived continuously in Florida? _____

12. Have you ever filed for Bankruptcy? Yes No

If yes...

When did you file? _____

Chapter 7 or 13? _____

Did you get a discharge? Yes No

13. Do you pay Child Support or Alimony. Yes No

If yes...

How much per month? _____

Are you current? _____

14. Have you owned a business in the last 6 years? Yes No

If yes...

Name the business _____

When it started and ended _____

15. Are you Married _____ Separated _____ Single _____

16. Do you have any Dependents (children under 18, full time college students, elderly or disabled persons you claim on your Federal Taxes) living in your household? (Do not count Spouse)

Yes No

If yes...

How many _____

17. What is your average GROSS yearly income, and from what sources _____

Have you earned Same More Less in the last 6 months?

What is your Spouses average GROSS yearly income, and from what sources _____

Have they earned Same More Less in the last 6 months?

WHAT DO YOU CONSIDER THE MOST IMPORTANT ISSUE(S) THAT NEEDS TO BE RESOLVED(such as bad credit score, collection calls, wage garnishment, lawsuits, ect.)