

CLOON LEGAL SERVICES INTAKE FORM

Date: _____

NAME :

First Full Middle Last
ADDRESS:

(City, State, & Zip)

ANY OTHER NAMES YOU USED IN LAST 6 YEARS? _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: _____

PHONE NO.: (Home) _____ (Work) _____ (Cellular) _____

TELL US ABOUT YOUR FINANCIAL SITUATION:

Are you presently employed? YES NO

Name and address of your employer: _____

What is your job title? _____

How long have you worked for this employer? _____

Average gross pay per paycheck (before taxes and other deductions) \$ _____

How often are you paid?

WEEKLY TWICE PER MONTH EVERY 2 WEEKS MONTHLY

Are you receiving any other income, such as child support, alimony, Social Security, unemployment, disability insurance, workers compensation, pension payments or income from an Indian tribe? YES NO

Source of that income:

_____ How much do you get per month? \$ _____

Living arrangements (check one)

- Never married
- Married, living together
- Married, living apart
- Divorced
- Widowed
- Living with another person (other than your children)
- Other (explain) _____

If you are:

- Married (whether living together or apart); or
- Living with someone other than your children (partner, relative, whoever)

Then we need the following information on the other person(s):

NAME:

First Full Middle Last
ANY OTHER NAMES USED IN LAST 6 YEARS? _____

SOCIAL SECURITY NUMBER: _____ DATE OF BIRTH: _____

PHONE NO.: (Home) _____ (Work) _____ (Cellular) _____

<p>If married, are you living together? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>If not, where does your spouse live?</p> <p>ADDRESS: _____ (City, State, & Zip)</p> <p>How long have you been living apart? _____</p>

SPOUSE'S/PARTNER'S/ROOMMATE'S EMPLOYMENT:

Are they presently employed? **YES** **NO**

Name and address of their employer: _____

What is their job title? _____

How long have they worked for this employer? _____

Average gross pay per paycheck (before taxes and other deductions) \$ _____

How often are they paid?

WEEKLY TWICE PER MONTH EVERY 2 WEEKS MONTHLY

Are they receiving any other income, such as child support, alimony, Social Security, unemployment, disability insurance, workers compensation, pension payments or income from an Indian tribe? **YES** **NO**

Source of that income:

_____ How much do they get per month? \$ _____

In your home:

Do you have a working computer with reliable Internet access? **YES** **NO**

Do you have the ability to use it for tasks such as email, surfing the Internet, etc.? **YES** **NO**

Do you have an email address that you use outside of work? **YES** **NO**

If so, what is your Email Address: _____

Spouse's Email Address: _____

How did you hear about us (check all that apply)?

Another attorney – if so, who can we thank? _____

Relative(s) – if so, who can we thank? _____

Friend(s) – if so, who can we thank? _____

Co-worker(s) – if so, who can we thank? _____

Internet – how – Google, Yahoo, our website? _____

Newspaper ad – name of paper? _____

Phonebook – which town or phone company book? _____

Other – please describe _____

DO YOU HAVE CHILDREN (MINORS AND ADULTS) LIVING WITH YOU, OR ARE YOU ORDERED TO PAY CHILD SUPPORT ON MINOR CHILDREN LIVING WITH SOMEONE ELSE?

YES NO

If so, please list below:

FIRST AND LAST NAME OF CHILD				
AGE				
RELATIONSHIP (son, daughter, stepchild, grandchild, etc.)				
DO YOU HAVE THE CHILD LIVING WITH YOU THE MAJORITY OF THE TIME?				
IF NOT, WHERE DOES THE CHILD LIVE THE MAJORITY OF THE TIME (w/ex-spouse or ex-partner, college, etc.)?				
AMOUNT OF CHILD SUPPORT YOU ARE SUPPOSED TO PAY				
AMOUNT OF CHILD SUPPORT YOU ARE BEHIND ON PAYING				
AMOUNT OF CHILD SUPPORT YOU ARE SUPPOSED TO RECEIVE				
AMOUNT OF UNPAID CHILD SUPPORT YOU ARE OWED AS OF TODAY				

ASSETS (if married, answer for both of you):

Do you own any real estate (houses, land) or mobile homes? YES NO

Address (if mobile home, year and model also)			
Do you live on the property?			
Is it located outside the city limits?			
If so, how much land?			
Do you want to keep it?			
Value?			

Has a foreclosure suit been filed?			
Have you applied for, or have you been granted/denied, a home loan modification?			
What year did you buy the house?			
1st Mortgage Lender			
Principal balance (payoff)			
Monthly payment (if includes tax or insurance escrow, put T and/or I next to amount)			
Are you behind on the payments?			
If so, how much?			
2d (and/or 3 rd) Mortgage Lender			
Principal balance (payoff)			
Monthly payment			
Are you behind on the payments? If so, how much?			
Is there a balloon payment on any of the house loans? (a balloon payment is when the note has to be renewed every 3-5 years or so; not a full 30-year mortgage)			

How many vehicles (including cars, trucks, trailers, ATVs, RVs, boats and airplanes) do you have? (Include ALL, even ones you do not owe money on!)

1 2 3 4 5 6 (CIRCLE ONE)

Year, make and model (and type of item if not obvious)				
Value?				
Do you owe money on it?				
Name of Lender				

Principal balance (payoff)				
Monthly payment				
Interest Rate				
When did you buy it?				
Did you refinance it after you bought it?				
Are you behind on the payments? If so, how much?				
Do you want to keep it?				
Has the lender threatened repossession?				

Do you have any other property you owe money on (for example, furniture with Nebraska Furniture Mart, electronics with Best Buy, vacuums with Kirby/Preferred Credit, water softeners or appliance loans, computers with Dell, etc.)? YES NO (if yes, list below)

Name of Lender			
Year, make and model (and type of item if not obvious)			
Present payoff balance			
Monthly payment			
Interest Rate			
When did you buy it?			
Did you refinance it after you bought it?			
What do you think it is worth? (roughly – don't just put a question mark in)			
Are you behind on the payments? If so, how much?			
Do you want to keep it?			

	Where located (Name of bank & city)	Names on account (who owns it?)	Balance as of today
Checking account(s)			
Savings account(s)			
Other (mutual funds, certificates of deposit, etc.)			

Has anyone filed a lawsuit against you? **YES** **NO** Have you been garnished? **YES** **NO**

Do you have a potential claim for damages (such as personal injury from a vehicle accident, workers comp, medical malpractice, small claims, etc.) against someone else? **YES** **NO**

Do you expect to inherit anything in the near future? **YES** **NO**

DEBTS (if filing together, answer for both of you):

You do not need to re-list house and car loans you put in above.

- Unsecured Credit Cards (MasterCard, Visa, etc.) - approximate total owed \$ _____
- Deficiencies on Repossessions or Foreclosures
Approximate total owed \$ _____ owed to _____
Approximate total owed \$ _____ owed to _____
- Medical/Dental Bills – approximate total owed \$ _____
- Real Estate/Property Taxes – approximate total owed \$ _____
- Income Taxes
Approximate total owed \$ _____ to IRS Kansas Other _____ Year(s) _____
Approximate total owed \$ _____ to IRS Kansas Other _____ Year(s) _____
Has the IRS filed a tax lien, or has the KDOR filed a tax warrant? **YES** **NO**
- Child Support/Alimony arrearages – approximate total owed \$ _____
- Student Loans or tuition/educational debts – approximate total owed \$ _____
Status: Forbearance/deferment In repayment (current) In repayment (behind) Default
- Payday loans – approximate total owed \$ _____
- NSF Checks that aren't payday loans – approximate total owed \$ _____
- Car Title loans (This is not the same as a regular car loan) – approximate total owed \$ _____
- Business-related debts (include personal guarantees of company loans) – approximate total owed \$ _____
- Finance company loans (for example, HFC, Beneficial)
Approximate total owed \$ _____ to _____
Approximate total owed \$ _____ to _____
- Personal loans owed to friends/family (list even if you plan to pay)
Approximate total owed \$ _____ to _____
Approximate total owed \$ _____ to _____
- Other _____

MORE QUESTIONS (We appreciate your patience – you're almost done!)

(If married and filing together, answer for both of you):

Have you lived anywhere but Kansas in the last 8 years?

YES **NO**

Do you have any rent-to-own agreements or any leases (apartment, vehicle, house)? **YES** **NO**

Were you ordered to pay any debts as part of a divorce that remain unpaid?
YES **NO**

Are you involved in a pending divorce or planning to file divorce?
YES **NO**

Have you declared bankruptcy in the last 8 years?
YES **NO**

Have you filed all tax returns (including 2013) for the last 6 years? **YES** **NO**
If not, which years have not been filed? _____

2013 Tax returns -

- I am expecting a refund of about \$_____
- I already received a refund of about \$_____
- I owed about \$_____ (if so, has it been paid yet?) **YES** **NO**

Are you liable on anyone else's debts, or is anyone else liable on any of your loans (for example, cosigner on a loan, or you or a prior spouse have medical debts incurred during that marriage – even if they were ordered to pay the debts in the divorce)?
YES **NO**

Do you owe any court fines, fees, or restitution from a criminal case?
YES **NO**

Have you contacted a bankruptcy attorney before (other than us) or a credit counseling agency before? (It's okay if you have. We won't get upset. We just need to know what other options you have looked at).
YES **NO**

Have you owned your own business (been self-employed) in the last 6 years?
YES **NO**
