

Initial Client Interview Sheet
PLEASE COMPLETE AND BRING THIS WITH YOU TO YOUR INITIAL MEETING
WITH LAUREN ROSS (818)847-0211

The following information is needed in order to properly evaluate your situation. As with all communication between you and the attorney, all the information supplied is strictly confidential. It is very important for you to supply all relevant information, as the attorney cannot properly advise you without a complete understanding of you situation. If you are in doubt or have any questions, talk to the attorney about it. Remember it is necessary for you to be completely honest and candid with the attorney. In case of Married couple, each needs to answer the questions. Call us at 818-847-0211 to set up an appointment or with questions.

Name: _____

Occupation: _____

Home Address:

Business Address:

Home Phone: _____

Business Phone: _____

E-mail: _____

Fax Number: _____

Spouse's Information

Name: _____

Occupation: _____

Home Address:

Business Address:

Home Phone#: _____

Business Phone: _____

E-mail: _____

Fax Number: _____

☐ Never married ☐ Married, living together ☐ Married, living apart

☐ Living with a domestic partner ☐ Divorced ☐ Widowed

If divorced, when did it become final: _____

Number of dependant children: _____

Any other person dependant on you: _____

What is your age: _____ Age of your spouse _____

LAUREN ROSS, ATTORNEY AT LAW 2550 N. HOLLYWOOD WAY #404 BURBANK, CA 91505
The Law Office of Lauren Ross is a federally designated debt relief agency
pursuant to Title 11 of the US Code and provides legal assistance to consumers
seeking relief under the Bankruptcy Code

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☐ Are you or your spouse receiving any disability, workers comp or retirement income?

If so, how much per month: \$_____

How long have you lived in the state of California: _____. If less then two years, list every state you have lived in the past two years and the date you lived there:

List all real estate you owned, when it was acquired and its present value:

| Location | Date Acquired | Value |
|----------|---------------|-------|
| | | \$ |
| | | \$ |
| | | & |

List anything given away, traded or transferred worth more then \$1,000 in the past five years, including to family members:

| Item | Value | Date transferred | To whom |
|------|-------|------------------|---------|
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| | \$ | | |
| | \$ | | |

List all bankruptcy you have ever filed and the outcome of each case:

| Date | Chapter 7, 11, 13, 12 | Outcome (dismissed or completed) |
|------|-----------------------|----------------------------------|
| | | |
| | | |
| | | |

If you owe any money on any of your vehicles, list the type of vehicle, date purchased or leased and the amount owed:

| Type of vehicle | Date purchased | Amount owed |
|-----------------|----------------|-------------|
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| | | \$ |
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Have you closed any financial account (checking, savings, retirement, IRA, stock, mutual fund, Christmas club) in the past two years?

| Type of account | Date closed | Value when closed |
|-----------------|-------------|-------------------|
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| | | \$ |
| | | \$ |

Have you received, or are you entitled to, any inheritance, property settlement agreement, or proceeds from a life insurance? YES ☐ NO ☐

Will you received any inheritance, property settlement agreement, or proceeds from a life insurance with in the next two years? YES ☐ NO ☐

Do own or have any ownership interest, in any business including partnerships:

| Type of business | Date started (closed) | Annual gross income |
|------------------|-----------------------|---------------------|
| | | \$ |
| | | \$ |

Have you sold, transferred or closed any business (or an interest in) with in the past three years? YES ☐ NO ☐

List all retirement accounts you have an interest in (IRA, 401k, Union, Government, Military, Profit Sharing):

| Type of account | Date withdrawals can start | Current value |
|-----------------|----------------------------|---------------|
| | | \$ |
| | | \$ |
| | | \$ |

List all financial accounts you have an interest in (checking, savings, CD, Christmas club etc):

| Type of account | Name of Bank etc | Current balance |
|-----------------|------------------|-----------------|
| | | \$ |

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Have you co-signed on a loan for anyone else? YES ☐ NO ☐

Do you have anything of yours in the possession or name of someone else?

YES ☐ NO ☐

Do you have your name on anyone else's bank account, real property or vehicle?

YES ☐ NO ☐

Are you suing any one or have the right to sue them? YES ☐ NO ☐

Have you paid any family member any money in the past year (excluding support)?

YES ☐ NO ☐

Have you filed all tax returns for the past three years? YES ☐ NO ☐

Have you made any major purchases (over \$200) on any credit card in the past three months? YES ☐ NO ☐

Have you taken any cash advances in the past three months? YES ☐ NO ☐

Have you made any balance transfers on any credit card in the past three months?

YES ☐ NO ☐

Do you own any money from a marital settlement or judgment of divorce?

YES ☐ NO ☐

Have you been ordered to pay child or spousal support? YES ☐ NO ☐

Is any support past due? YES ☐ NO ☐

Does any one owe you money for any reason? YES ☐ NO ☐

Do you have any claims against any one or the right to sue any one? YES ☐ NO ☐

Do you have any tax refund due you at this time? YES ☐ NO ☐

Have you changed any payroll deduction with in the past six months? YES ☐ NO ☐

Have you set up a trust in the past ten years? YES ☐ NO ☐

Do you receive any income from a trust or annuity? YES ☐ NO ☐

Do you have income from royalties, gas or mineral rights, copyrights, licenses agreements or patents now or in the future? YES ☐ NO ☐

Do you have a life estate or the right to use anyone else's property? YES ☐ NO ☐

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Do own any stocks or bonds? YES ☐ NO ☐

☐ Do you have a storage unit? If so, what is in it: _____

☐ Do you have a safety deposit box? If so, what is in it _____

Any thing else you think the attorney should be made aware of? _____

Date: _____ Signature: _____

Date: _____ Spouse's Signature: _____