

Benjamin C. Yablon, ESQ

Bankruptcy - Debt Settlement - Credit Repair

303-562-3167 | Benjamin@YablonLaw.com | 1444 Stuart St., Denver, CO 80204

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Client Intake Sheet page 1 of 5

Instructions:

Thank you for your interest in my services. For our initial consultation I will need to see the following:

1. Your most recently filed income tax return. (Both business and personal if you own a business.)
2. A recent pay check stub for both you and your spouse. (Even if you are not planning to file jointly.)
3. A breakdown of any other income you have received in the last six months from sources other than employment.
4. A list of your creditors both secured and unsecured and the approximate amount you owe them.
5. If you can, pull a credit report at www.annualcreditreport.com and bring it with you.
6. Complete the *CLIENT INTAKE SHEET* on pages 2-4 and sign agreement on page 5.
7. I charge a \$50.00 consultation fee which is credited toward the full retainer of \$300.00. The retainer fee is due at the end of the consultation if you decide to move forward using my office. If you decide to explore other options, only the \$50.00 is due. I accept cash, check or money order payments, but no credit cards (it is a conflict of interest).

Once my office is retained, you will refer your creditors to me. Then under the Fair Debt Collection Practices Act, third party debt collectors must not communicate with you directly. They may only inquire about you through me, your lawyer.

The typical fee in a chapter 7 bankruptcy is \$2,000.00. My fee includes credit rehabilitation and can be paid over time. The credit rehabilitation process usually takes about a year, and is very important if you plan to purchase a new car or home over the next ten years. Credit repair is included at no additional cost and begins upon entry of the Bankruptcy Discharge Order. The process involves helping you audit credit reports and dispute negative items, as well as coaching you through several strategies designed to create positive relationships with new banks.

My office is located at 1444 Stuart St., Denver, CO 80204

Feel free to call (303) 562-3167 if you have questions, or email me directly at Benjamin@YablonLaw.com

I look forward to helping you through this difficult time.

Thank You,

Benjamin C. Yablon, Esq.

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Please print this document and complete it. (*Do not worry about exact numbers at this point.*)

1. Name: _____SSN _____ Age: _____

2. Address: _____ City: _____ Zip: _____ County: _____

3. Contact Phone Number(s) _____

4. Marital Status: _____

5. Spouses Name: _____ age: _____

Do you foresee any major life changes
(birth of a child, loss of a job), in the next year? _____

6. If married, will you file jointly? _____

7. How many people (including yourself) are in your household? _____

8. Please circle where you heard about me:

- a. Troubleshooter.com b. Haystackcolorado.com c. Other

9. **WHAT KIND OF DEBTS DO YOU HAVE?** * Please list an approximate amount for each *

Credit Cards \$ _____

Store Cards \$ _____

Medical Bills \$ _____

Repossessions \$ _____

Bounced Checks \$ _____

Payday Loans \$ _____

Signature Loans
(loans with no collateral) \$ _____

Guaranteed
Student Loans \$ _____

Back Taxes \$ _____

Auto Loans \$ _____

Total of Mortgages \$ _____

Back Child Support \$ _____

Other Debts (describe) \$ _____

10. How many creditors do you believe you have? _____

11. If you have credit card debt when was the last time you charged? _____

12. What is your **gross** monthly household income? You: _____ Your spouse _____ (even if filing alone)

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12. PLEASE LIST YOUR MONTHLY EXPENSES

Rent/Mortgage _____	Auto Payment _____
Telephone _____	Auto Insurance _____
Cable _____	Child Care _____
Internet _____	Recreation _____
Water _____	Student Loans _____
Electric _____	Child Support _____
Groceries _____	Medical/Dental _____
Gasoline _____	Credit Card payments _____
Household Maintenance _____	Clothes _____
Laundry _____	Other _____

13. How much income did you report for last year? _____
How much income have you earned so far this year? _____

14. Do you make 401k or other retirement savings contributions? _____

15. **VEHICLES** – Do you own or lease any vehicles? _____

Vehicle # 1 – Year/Make/Model _____	Monthly Payment _____
Fair Market Value _____	Balance Owed _____

Vehicle # 2 – Year/Make/Model _____	Monthly Payment _____
Fair Market Value _____	Balance Owed _____

List ANY other vehicles you own below:

16. **REAL ESTATE** – Do you or your spouse own **any** real estate? _____ How much do you owe? _____

17. When did you purchase the real estate and how much was the purchase price? _____

18. How much is your monthly mortgage payment? _____ Are your payments current? _____

19. How much could you sell the home for today? _____

20. **OTHER ASSESTS** – Please list any other assets you own that have significant value: _____

21. **SAVINGS** - Please describe any savings you have accumulated: _____

22. **TAXES** – Do you owe any taxes? _____ For what year(s) _____

23. Are there any years for which you have not filed taxes? _____ What year(s) _____

24. Did you receive a tax refund *last* year? _____ How much? _____

25. Will you receive a tax refund for *this* year? _____ How much? _____

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- 26. Have you filed bankruptcy before? _____ What year? _____
- 27. In the last year have you given or paid a friend or family member more then \$500? _____
- 28. Have creditors been calling you at home? _____ At work? _____
- 29. Have you been served with a summons in the last year? _____
- 30. Are your wages being garnished? _____
- 31. Are you behind on your car or house payment? _____
- 32. Will you have trouble obtaining the address of any of your creditors? _____
- 33. Have you lived outside of Colorado in the past two years? _____
- 34. Have you pulled a credit report recently? _____
- 35. Have you financed a car in the past 3 years? _____
- 36. Did you roll any previous loan or lease balances into that loan? _____
- 37. Have you taken loans or withdrawals from retirement savings? _____
- 38. Do you have possession or title to any real or personal property that really belongs to someone else? _____
- 39. Have you sold any assets in the past 4 years? _____
- 40. Have you transferred, re-titled, donated or given away anything of value in the past 4 years? _____
- 41. Has any taxing authority given you notice they will levy on your assets? _____
- 42. Have you made any large purchases in the past 90 days? _____
- 43. Taken any cash advances or payday loans in the past 90 days? _____
- 44. Have you made any balance transfers between credit cards in the past 6 months? _____
- 45. Have you participated in a debt consolidation or debt management program in the past year? _____
- 46. Have you paid any other lawyer for advice about your debts or filing bankruptcy in the past year? _____
- 47. Have you been in business for yourself in the past 6 years? _____
- 48. Have you been an officer or partner in a business in the past 6 years? _____
- 49. Has anyone died and left you an inheritance that you have not received yet? _____
- 50. Do you owe any money on account of a marital settlement agreement or judgment of divorce? _____
- 51. Do you pay child or spousal support? _____
- 52. Is any support past due? _____
- 53. Are you owed any support? _____
- 54. Does anyone owe you money? _____
- 55. Does anyone else contribute to the expenses of your household? _____
- 56. Have you created a trust in the past four years? _____
- 57. How many years have you lived in Colorado? _____
- 57. What do you wish to accomplish today? _____
- 58. What questions would you like answered today? _____
- 59. If you were to file a bankruptcy using my office, do you intend to pay all at once or over time? _____

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I (WE), THE DEBTOR(S), HEREBY CERTIFY THAT I (WE) HAVE COMPLETED THIS QUESTIONNAIRE AND THAT THE INFORMATION PROVIDED HEREIN IS TRUE AND COMPLETE TO THE BEST OF MY (OUR) KNOWLEDGE. I (WE) UNDERSTAND THAT THE ATTORNEY WILL RELY ON THE INFORMATION HEREIN TO EXPLAIN OUR BANKRUPTCY OPTIONS

Signed: _____ Date: _____

Signed: _____ Date: _____