

# ATTORNEY DRAKE OZMENT

www.DrakeOzment.com

## CLIENT INTERVIEW

Attorney Fees: \$ \_\_\_\_\_

Court Costs: \$ \_\_\_\_\_

Chapter: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Date: \_\_\_\_\_ How did you hear about us? \_\_\_\_\_

Have you ever filed Bankruptcy?  Yes  No If yes, how long ago? \_\_\_\_\_ How many times? \_\_\_\_\_

Name: \_\_\_\_\_  Single  Married  Divorced Spouse's Name: \_\_\_\_\_

Telephone: Home: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Work (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Address: \_\_\_\_\_

Children Ages \_\_\_\_\_ Your E-mail Address: \_\_\_\_\_

Do you rent?  Yes  No If yes, monthly rent payment: \$ \_\_\_\_\_

Do you own?  Yes  No Date of purchase: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_ Fair Market Value: \$ \_\_\_\_\_

How many properties do you own? \_\_\_\_\_ **More Than One Property? Please list addresses and mortgages on back.**

### Primary Residence:

1<sup>st</sup> Mortgage Company Name: \_\_\_\_\_ Balance Owed: \$ \_\_\_\_\_

Monthly Payment: \$ \_\_\_\_\_ Are Taxes and Insurance included in your payment?  Yes  No

Are you delinquent?  Yes  No How Many Months? \_\_\_\_\_ Have you been served?  Yes  No Sale Date? \_\_\_\_\_

2<sup>nd</sup> Mortgage Company Name: \_\_\_\_\_ Balance Owed: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Are you delinquent?  Yes  No How Many Months? \_\_\_\_\_ Have you been served?  Yes  No Sale Date? \_\_\_\_\_

HOA Company Name: \_\_\_\_\_ Payment: \$ \_\_\_\_\_

Monthly/ Quarterly/ Yearly Are you delinquent?  Yes  No How Many Months? \_\_\_\_\_

How much do you owe? \$ \_\_\_\_\_ Have you been served?  Yes  No Sale Date? \_\_\_\_\_

### Other Liens:

Car #1 Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Monthly Payment \$ \_\_\_\_\_ Mileage \_\_\_\_\_ Value \$ \_\_\_\_\_ Purchase Date: \_\_\_\_\_

Car #2 Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Monthly Payment \$ \_\_\_\_\_ Mileage \_\_\_\_\_ Value \$ \_\_\_\_\_ Purchase Date: \_\_\_\_\_

Car #3 Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Monthly Payment \$ \_\_\_\_\_ Mileage \_\_\_\_\_ Value \$ \_\_\_\_\_ Purchase Date: \_\_\_\_\_

Other Vehicles (Including Boats, Motorcycles or RV's): \_\_\_\_\_

Employment / Monthly Income: Debtor: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

Do you own any interest in a business? \_\_\_\_\_ **Please list details on back.**

Family Support: \$ \_\_\_\_\_ Other Income: \$ \_\_\_\_\_

Have you paid back money to any relatives in the past year? \_\_\_\_\_ How much? \$ \_\_\_\_\_

Do you expect an inheritance within the next six months? \_\_\_\_\_

Last Tax Year Filed \_\_\_\_\_  Refund \$ \_\_\_\_\_ or  Amount Owed \$ \_\_\_\_\_

Student Loan Debt Total: \$ \_\_\_\_\_ Medical Bill Debt Total: \$ \_\_\_\_\_

Total Credit Card Debt and any other unsecured debt estimated total: \$ \_\_\_\_\_

How much have you charged in the last 90 days? \$ \_\_\_\_\_ All Year? \$ \_\_\_\_\_ On How Many Cards? \_\_\_\_\_

List all checking & savings accounts balances: \_\_\_\_\_

List all IRA, 401K, Stocks, Bonds, Annuity, Money Market accounts: \_\_\_\_\_

List all assets valued over \$1,000.00 other than home or cars listed above: \_\_\_\_\_

Are you being sued for a debt or mortgage foreclosure? \_\_\_\_\_

Do you have any judgments against you? \_\_\_\_\_

Do you have a pending Personal Injury Claim? \_\_\_\_\_

Lawsuits as a Plaintiff or Defendant: \_\_\_\_\_

**PLEASE LIST ALL ADDITIONAL REAL ESTATE AND CORPORATE INFORMATION ON BACK**