

Red fields are required fields

### INTAKE QUESTIONNAIRE ENDERTON & MATHEWS, LLC

Today's Date: \_\_\_\_\_

Name: \_\_\_\_\_ Co-debtor : \_\_\_\_\_

Address: \_\_\_\_\_ # \_\_\_\_\_ City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

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

Have you filed bankruptcy before?: You: Never filed or Yes: Year: Chapter:

Co-debtor: Never filed or Yes: Year: Chapter:

Have you ever been Divorced?: You: No Yes: Date of Final Decree: \_\_\_\_\_

Co-debtor: No Yes: Date of Final Decree: \_\_\_\_\_

Has this firm, Stephen M. Enderton, or Sarah Mathews ever represented any member of your family, including ex-spouses, for any reason? No Yes: Name of person represented \_\_\_\_\_

Please provide the following information:

Home:	Rent	Own	Vehicles:	Credit Cards:
	Keep or	Surrender		
Value: \$ _____			Yr/Model _____ Value \$ _____	Any cash advances in last 90 days: No Yes
1 <sup>st</sup> Mtg Bal: \$ _____ Pmt \$ _____			• Bal. owed \$ _____ Pmt \$ _____	If so: Amount: \$ _____
2 <sup>nd</sup> Mtg Bal: \$ _____ Pmt: \$ _____			• Int. Rate _____ Current? Lease? Keep or Surrender	When: _____
3 <sup>rd</sup> Mtg Bal: \$ _____ Pmt \$ _____			Yr/Model _____ Value \$ _____	Any purchases over <b>\$200</b> in last 90 days: No Yes
Past due amount, if any: 1 <sup>st</sup> \$ _____			• Bal. owed \$ _____ Pmt \$ _____	If so, the amount charged in the past year: \$ _____
2 <sup>nd</sup> \$ _____			• Int. Rate _____ Current? Lease? Keep or Surrender	
Do you have an HOA? Yes No			Yr/Model _____ Value \$ _____	
Past due HOA, if any: \$ _____			• Bal. owed \$ _____ Pmt \$ _____	
Do you own a 2 <sup>nd</sup> home? Yes No			• Int. Rate _____ Current? Lease? Keep or Surrender	
Value: \$ _____ Debt: \$ _____				
Does 2 <sup>nd</sup> home have an HOA?				
Yes No Past due? _____				

<p><b>Please read and check each box. The attorney can answer any questions you may have.</b></p> <p>When there is an expected bankruptcy filing:</p> <p>You are advised to stop using any credit cards.</p> <p>You are advised not to make payments to insiders.</p> <p>You are advised to keep current on debts you plan to reaffirm.</p> <p>You are advised to not make any major purchases.</p>	<p><b>Office use only:</b> [ ] Ch 7 [ ] Ch 13</p> <p>Atty: _____</p>
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<b>Do you owe TAXES?</b>	No	Yes	If so, how much \$ _____	Years owed: _____
Have you filed all past income tax returns?	No	Yes	If no, what years need filed? _____	
Did you receive a tax refund for the most recent filing year?	No	Yes	If yes, how much? _____	

<b>Alimony/Child Support: PAY:</b>	No	Yes		
<b>OWE:</b>	No	Yes		
Are you behind?	No	Yes	Amount: \$ _____	
<b>Have you co-signed for anyone:</b>	No	Yes		
<b>Has anyone co-signed for you:</b>	No	Yes		
<b>Do you owe any criminal fines or restitution?</b>	No	Yes		

<b>Gross Monthly Pay: Male</b>	\$ _____
<b>Co-debtor:</b>	\$ _____
Do you have unpaid earned wages?	\$ _____
Note: Some unpaid wages are not exempt.	
<b>Other Income:</b> (includes child support, alimony, SSI, etc.)	\$ _____
Number of Minor Children at home	_____

<b>Do you own, operate, or have an interest in any business?</b>	No	Yes
If so what type of business?		
Does the business have any assets?	No	Yes If yes, what is the value of the assets? \$ _____
Does the business owe any debt?	No	Yes If yes, how much? \$ _____
Have you guaranteed any or all of the debts?	No	Yes
Do you wish to continue the business?	No	Yes

I, the undersigned, hereby have requested to consult with an attorney with Enderton & Mathews, LLC, and to obtain information and advice from an attorney relating to relief from debts including Chapter 7 and Chapter 13 bankruptcy under the United States Bankruptcy Code. I understand that I have only requested a consultation at this point and that I have not retained the attorney or Enderton & Mathews, LLC, for anything more than a free consultation. I understand that I will be required to sign a separate retainer agreement should I wish to retain the attorney or Enderton & Mathews, LLC, for further service beyond the free consultation. I acknowledge that the attorney or Enderton & Mathews, LLC, has not offered to represent my interests in a bankruptcy at this point and will only do so after obtaining more information necessary to make the determination as to whether a bankruptcy is in my best interest and whether I qualify for relief under the United States Bankruptcy Code. I acknowledge that I have been provided or have downloaded a copy of the "Disclosure Pursuant to 11 U.S.C §527 " and the "Disclosure Pursuant to 11 U.S.C. §527(a)(2)." I hereby grant permission to Enderton & Mathews, LLC or any employee to send email to the email address provided herein.

Note: We are required by law to provide the Disclosures.

Date: \_\_\_\_\_ Client: \_\_\_\_\_  
Type your name to declare that you have read and agree to the terms.

Date: \_\_\_\_\_ Client: \_\_\_\_\_  
Type your name to declare that you have read and agree to the terms.

Disclosure Pursuant to 11 U.S.C. §527

**IMPORTANT INFORMATION ABOUT BANKRUPTCY ASSISTANCE SERVICES FROM AN ATTORNEY OR BANKRUPTCY PETITION PREPARER.**

If you decide to seek bankruptcy relief, you can represent yourself, you can hire an attorney to represent you, or you can get help in some localities from a bankruptcy petition preparer who is not an attorney. **THE LAW REQUIRES AN ATTORNEY OR BANKRUPTCY PETITION PREPARER TO GIVE YOU A WRITTEN CONTRACT SPECIFYING WHAT THE ATTORNEY OR BANKRUPTCY PETITION PREPARER WILL DO FOR YOU AND HOW MUCH IT WILL COST.** Ask to see the contract before you hire anyone.

The following information helps you understand what must be done in a routine bankruptcy case to help you evaluate how much service you need. Although bankruptcy can be complex, many cases are routine.

Before filing a bankruptcy case, either you or your attorney should analyze your eligibility for different forms of debt relief available under the Bankruptcy Code and which form of relief is most likely to be beneficial for you. Be sure you understand the relief you can obtain and its limitations. To file a bankruptcy case, documents called a Petition, Schedules and Statement of Financial Affairs, as well as in some cases a Statement of Intention need to be prepared correctly and filed with the bankruptcy court. You will have to pay a filing fee to the bankruptcy court. Once your case starts, you will have to attend the required first meeting of the creditors where you may be questioned by a court official called a “trustee” and by creditors.

If you choose to file a chapter 7 case, you may be asked by a creditor to reaffirm a debt. You may want help deciding whether to do so. A creditor is not permitted to coerce you to reaffirming your debts.

If you choose to file a chapter 13 case in which you repay your creditors what you can afford over 3 to 5 years, you may also want help with preparing you chapter 13 plan and with the confirmation hearing on your plan which will be before a bankruptcy judge.

If you select another type of relief under the Bankruptcy Code other than chapter 7 or chapter 13, you will want to find out what should be done from someone familiar with that type of relief.

Your bankruptcy case may also involve litigation. You are generally permitted to represent yourself in litigation in bankruptcy court, but only attorneys, not bankruptcy petition preparers, can give you legal advice.

**I acknowledge that I have been provided a copy of this disclosure and that I understand the contents therein.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Disclosure Pursuant to 11 U.S.C. §527(a)(2)**

**In accordance with section 527(a)(2) of the Bankruptcy Code, be advised that:**

1. All information that you are required to provide with a petition and thereafter a bankruptcy case must be complete, accurate, and truthful.
2. All assets and all liabilities must be completely and accurately disclosed with the replacement value of each asset as defined in section 506 listed after reasonable inquiry to establish value. This must be the replacement value of the property at the date of filing the petition, without deducting for costs of sale or marketing, established after a reasonable inquiry. For property acquired for personal, family, or household use, replacement value means the price a retail merchant would charge for property of that kind, considering the age and condition of the property.
3. Current monthly income, the amounts specified in the “means test” under section 707(b)(2), disposable income must be stated after reasonable inquiry.
4. Information that you provide during your case may be audited, and failure to provide such information may result in dismissal of the case or other sanction, including a criminal sanction.

I acknowledge that I have been provided a copy of this disclosure and that I understand the contents therein.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

\_\_\_\_\_

Signature

\_\_\_\_\_

Date