

ELIZABETH M. ATKINS

Attorney at Law

MEMBER SC & NC BAR

CERTIFIED BANKRUPTCY SPECIALIST

Appointment Date: _____

Appointment Time: _____

Thank you for calling the office to schedule an appointment with Ms. Atkins. As we know that your time is limited, please complete these forms and bring them with you to your first appointment so that we will be able to meet with you in a timely manner. If for some reason, you are unable to make your appointment, we would appreciate your calling the office to reschedule your appointment for a more convenient time.

After filling out the enclosed form please bring the completed paperwork with you to your first appointment. This information will give us a complete financial picture and allow us to give you the advice that will hopefully alleviate your financial problems.

Please make every effort to provide all of the requested information. Without your complete information Mrs. Atkins may not be able to provide complete advice about your options.

INITIAL MEETING WORKSHEET

Welcome to our office. We realize that meeting with an attorney, particularly about financial problems, is a new experience for many people. In an effort to help us to better understand your particular situation, we have developed this worksheet to gather needed information before you meet with the attorney. We believe this will give you an idea of the areas you will be discussing with the attorney. It will also enable the attorney to better inform you of your options.

IF YOU HAVE ANY QUESTIONS AS YOU COMPLETE THE WORKSHEET, PLEASE DO NOT HESITATE TO CALL.

Date _____

Name _____ Social Security # _____

*

_____ Age _____

Spouse _____ Social Security # _____

*

_____ Age _____

* If you have been known by any other name(s) during the last six (6) years, please indicate. For example, a maiden name, previous married name, or a "full" legal name for Social Security purposes should be noted.

Mailing Address _____ County _____

Street Address if different

Telephone Numbers _____ work

_____ home

_____ cell

E-mail Address _____

How long have you lived in South Carolina ? _____

INCOME

	Employer	How often?	How much each payday?
Yours	_____	_____	\$ _____
Your spouse	_____	_____	\$ _____

OTHER SOURCES OF INCOME

Social Security (incl. disability) _____	Unemployment \$ _____
Retirement/pension _____	Food stamps or WIC \$ _____
Child support or alimony _____	Self employment \$ _____
Other (please describe) _____	Part-time employment \$ _____

\$ _____

EXPENSES

Rent-Mortgage _____	Child support or alimony _____
Utilities _____	Child care _____
Food _____	Medical _____
Insurance _____	Auto (upkeep and gas) _____

\$ _____

Names and ages of dependents _____

VEHICLES

We need a description of all vehicles (car, truck, motorcycle) owned by you, even if they are not currently being driven.

Year	Make/Model	Amount of Monthly Payment	To Whom	Payments Remaining	Approximate Payoff
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Do you have insurance coverage for your vehicles? _____ Yes _____ No

REAL PROPERTY

Personal Residence

Street Address _____

Subdivision, if any _____

Date of Purchase _____ Purchase Price _____

Describe any major improvements to your home since date of purchase _____

What is the current value of your home \$ _____

What is the current county appraisal \$ _____

Circle if applicable VA FHA

<u>Mortgage</u> <u>Co. Name</u>	<u>Amount of</u> <u>Monthly Payment</u>	<u>Are Payments</u> <u>Up to Date?</u>	<u>Approximate</u> <u>Payoff</u>
1 st Mortg.		Yes No	\$
2 nd Mortg.		Yes No	\$
3 rd Mortg.		Yes No	\$

Circle applicable escrow items: (1) taxes (2) insurance

Please provide the most recent county property tax notice and insurance information on the property.

6. Please indicate if you own any of the following types of property, state the estimated value and describe the item.

Boat _____	Photographic equipment _____
Firearms _____	Tools _____
Animals _____	Collectibles _____
(used for breeding)	(books, stamps, art)

7. Are you married? _____ Yes _____ No; If yes, are you currently separated?
_____ Yes _____ No

Have you ever been divorced? _____ Yes _____ No; If yes, are you responsible for former marital debts? _____ Yes _____ No

8. Have you ever filed bankruptcy? _____ Yes _____ No

If yes, please provide details. _____

9. Have you consulted with an attorney regarding any legal problem within the last year?
_____ Yes _____ No

If yes, please explain. _____

10. Are you involved in any pending legal proceedings, either as the plaintiff or as the defendant? _____ Yes _____ No

If yes, please explain. _____

11. Has anyone threatened to commence legal proceedings against you within the last year? _____ Yes _____ No

If yes, provide details. _____

12. Are any of your debts cosigned or guaranteed by someone other than your current spouse? _____ Yes _____ No

If yes, please identify cosigner and creditor. _____
