

Sno-Isle Bankruptcy Group
INITIAL CLIENT WORKSHEET

Please take the time to complete this form in its entirety. Without this information, I will be unable to properly evaluate your situation, and my advice will not be as useful to you. When filling out this form, please keep a few tips in mind:

1. I am trying to gauge your general circumstances for now, so detail to the penny is not needed. Take your best guess at the answers and move on to the next question. Detailed information will come later.
2. “You” refers to your entire family (including dependents under 18)
3. Some of the question may seem a little odd, but they relate to specific rules in the Bankruptcy law that could affect your ability to seek bankruptcy court protection.
4. Please read the legal disclosures on the web page entitled “Bankruptcy Disclosures”. Unless you read them, I cannot advise you of your rights. It is a specific requirement of the law.

Stephen Garvey
WSBA #13486

The Sno-Isle Bankruptcy Group, is a Federally Certified Debt Relief Agency focusing on helping families overcome their debt issues. As part of that mission, we help people file for bankruptcy protection when necessary

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Part A: General Info About Your Family

1. How many people are in your household at this time? _____
(this includes only dependents who are still minors, but not adult children)
2. Has your family lived in this state for 4 years straight? Yes _____ No _____
3. If married, how many years? _____
4. Have you filed bankruptcy in the last 10 years? Yes _____ No _____
5. Are you a disabled veteran? Yes _____ No _____
6. Is there anyone living in your household other than a spouse or minor dependent?
Yes _____ No _____

Part B: Assets

1. Do you own your residence or do you rent: Own _____ Rent _____
-- If you own, what type (house, condo, mobile home)? _____
-- If you own, how much equity do you have? _____
-- If you own, are you current on mortgages, dues, taxes, etc? Yes _____ No _____
2. Do you own any other real estate? Yes _____ No _____
3. How many vehicles do you own outright? _____
4. How many vehicles do you make payments on? _____
5. Do you have any investments worth more than \$5,000.00? Yes _____ No _____
-- Are any of the investments not in a retirement account? Yes _____ No _____
6. Does anyone owe you more than \$2,000.00? Yes _____ No _____
7. Are you a plaintiff in any lawsuit or claim or class action? Yes _____ No _____
8. Are you the beneficiary under a Trust or are you expecting an inheritance?
Yes _____ No _____

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Part C: Income

1. Do you receive government assistance of any kind such as Social Security, unemployment compensation, L & I or AFDC? Yes _____ No _____
2. Do you receive child support or maintenance? Yes _____ No _____
3. How many jobs do you (remember this is total for household) have total? _____
4. Do you *now* own your own business or are you *now* self employed?
Yes _____ No _____
5. *In the last six years* have you owned your own business or were you self employed?
Yes _____ No _____
5. What is the total income (gross) you normally average from employment or self-employment for a month? _____
6. Have you received any significant financial help within 6 months? Yes _____ No _____
7. Have you cashed out any investments or sold any major assets in the last six months? (such as a 401(k) or sold a house) Yes _____ No _____

Please list any major changes in your income in the last 6 months:

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Part D: Unsecured Debts This does not include mortgages, car loans or loans with collateral but does include debt such as credit cards, personal lines of credit, medical bills, personal loans, payday loans, or deficiencies on repossessed vehicles.

1. How much unsecured debt do you think you have? _____

2. Is any of this for any of the following (please check):
 - a. Taxes _____
 - b. Student Loans _____
 - c. Child Support _____
 - d. Spousal Maintenance _____
 - e. other debt to ex-spouse _____
 - f. Court fines such as traffic, parking or criminal _____

3. Have you incurred more than \$500.00 of debt to any one creditor in the last 3 months?
Yes _____ No _____

4. Within the last year have you **repaid** any family member, friend, or business partner more than \$500.00 for a loan?
Yes _____ No _____

5. Within the last 90 days have you **repaid** any creditor more than \$500.00 on a debt? (This does not include recurring expenses such as rent, electricity, or insurance.)
Yes _____ No _____

4. Are any of the debts the result of fraud or theft or embezzlement on your part?
Yes _____ No _____

5. Has anyone sued you on any of these debts?
Yes _____ No _____

6. Are there any tax forms that you have not filed that you should have?
Yes _____ No _____

7. Do you owe *any* money (including credit card debt, negative balances, or lines of credit) to a bank where you have checking, savings or investment accounts?
Yes _____ No _____

NOTE: You may wish to consider closing or removing funds from any accounts at Wells Fargo because of the possibility that Wells Fargo may temporarily freeze the accounts when you file bankruptcy.

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