



Pickford
LAW OFFICE

Consultation Sheet

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We ask that you please fill out this form so that we can have a record of your visit with us. All of the information that you provide us is strictly confidential. h

Your Name		Your Spouse's Name		
Your Address		Home Phone	Cell Phone	Other Number
City, State & Zip		Today's Date		E-Mail Address
Marital Status	Married <input type="checkbox"/>	Single <input type="checkbox"/>	Separated <input type="checkbox"/>	How Did you Hear about Us? Ph.Book <input type="checkbox"/> Internet <input type="checkbox"/> Referred by:

REAL ESTATE (If none, skip, more than one real estate, use separate sheet for each property)

Description	Present Value	Yr. Purchased	Purchase Price	Property Intentions		
				Keep <input type="checkbox"/>	Sell <input type="checkbox"/>	Surrender <input type="checkbox"/>
	Balance Owed	Monthly Payment	No. of Months Late	In Foreclosure?		
First Mortgage						
Second Mortgage						
Other Liens						
Property Taxes						

VEHICLES, MOTORCYCLES, RECREATIONAL VEHICLES (List even if paid-off)

Year / Make / Model	Balance Owed	Monthly Payment	Months Late	Property Intentions	
				Keep <input type="checkbox"/>	Surrender <input type="checkbox"/>
				Keep <input type="checkbox"/>	Surrender <input type="checkbox"/>
				Keep <input type="checkbox"/>	Surrender <input type="checkbox"/>
				Keep <input type="checkbox"/>	Surrender <input type="checkbox"/>

OTHER DEBTS & CREDITORS

<i>Please Give Your Best Estimate</i>	<i>Approximate Balance</i>	<i>Total Charges 6 mos.</i>	<i>Cash Advances 6 mos</i>	<i>Mos. Late</i>
Total Credit Card Debt				
Total Personal Loans				
Repossessions				
Lawsuits/Judgments				
Student Loans				
IRS and State Income Taxes Owed				
Other				

INCOME ON A MONTHLY BASIS - Please list your average Monthly Income

Occupation	Gross Income	Net Income	Other Income	Other Income Source
You				
Spouse				
Number of Dependents		Ages of Dependents:		

MONTHLY LIVING EXPENSES		MISC. QUESTIONS					
Rent / Mortgage			Yes	No			
Association Dues		Do you have any retirement Accounts?					
Property Taxes		Any other valuable property?					
Home Phone		Any Repossessions/Foreclosures?					
Cell Phone		Repaid Family in last 2 years?					
Cable TV/Internet		Transfer/Sold anything in 2 years?					
Gas & Car Expense		Have you filed Bankruptcy before?					
Medical/Dental		Have you filed all your tax returns?					
Car Insurance		Do you own a Business?					
Life Insurance		Do you have Life Insurance or Annuities?					
Car Payments		Would you like to follow us on FaceBook?					
Gas and Electric		Would you like to receive our Newsletter?					
Water & Sewer		<i>If you have a Business, please describe:</i>					
Food & Household							
Child/Spousal Support							
Student Loans							
Clothing		<i>Questions you may have:</i>					
Child Care/Educational							
Tithing/Charity							
Business/Professional							
Other							
Total							
AREA BELOW FOR OFFICE USE ONLY							
Legal Matter	Fees/Legal Plan	Eval	P & L	Appraisal	F/U?	Ref?	PM?