

LAW OFFICES OF EDWARD GONZALEZ, P.C.

CLIENT QUESTIONNAIRE

NOTE: Please do not be intimidated! Give us general information, to the best of your ability. We do not need values down to the penny, at this time.

Today's Date _____ How did you hear about us? _____

Personal Information

Your Name: _____

Your Spouse's Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____ County: _____

Your Phone #'s: (H) _____ (Work) _____ (Cell) _____

Spouse's Phone # (H) _____ (Work) _____

(Cell) _____

Number of Dependents at Home: _____

How long have you lived at current address? _____ In current State? _____

Indicate if you are Married ___ Single ___ Divorced ___ Separated ___ Widowed ___

Do you own ___ or rent ___?

Have you ever filed bankruptcy (Chapter 7 or Chapter 13)? ___ No ___ Yes (Year filed ___)

Do you owe the IRS? ___ Yes ___ No The state? ___ Yes ___ No

Tax Year(s) owed? _____ Amount _____ Year tax return filed _____

Do you owe back Child Support or Alimony? ___ No ___ Yes (Amount owed \$ _____)

Are your wages being garnished? ___ Yes ___ No

Do you have judgments against you? ___ Yes ___ No

Facing a foreclosure? ___ Yes ___ No (If yes, Date for sale? _____)

Facing repossession? ___ Yes ___ No

Sold, given away, or had property taken from you by creditor within past year? ___ Yes

___ No

Secured Loans on Real Property

List your family home, rental property, or real estate and any mortgages that you have:

Address of Property	Monthly Payment	Value of Property (Realtor's Listed Price)	Loan Balance	No. of Months behind	Position of Mortgage (1 st , 2 nd , etc)

Is your spouse on the title to the family home? ___ Yes ___ No

Anyone else on the title to the family home? ___ Yes ___ No

Were you married when it was bought? ___ Yes ___ No

Answer the following on any assets that you own

List year, make, and model of any vehicle that you own:

Year	Make and Model	Monthly Payment	Value of Car	Loan Balance	No. of Months behind

Will you inherit any property in the near future? ___ No ___ Yes ___ Please describe:

Are you presently suing anyone? ___ No ___ Yes, Please describe:

Do you own any real estate that has no mortgages? ___ No ___ Yes, Please describe:

Do you usually get an income tax refund? ___ No ___ Yes (Approx. amount \$_____)

List any additional assets you have: _____

List approximate amount of the following types of credit:

Credit cards: _____ Personal loans: _____

Medical bills: _____ Judgments: _____

Criminal fines or restitutions (except taxes): _____

Any debts you have guaranteed for another person or a business: _____

Student Loans: _____ Tax Liens: _____

Approximate Income Information

Your gross pay? _____ Weekly __ Monthly __ Bi-Weekly __ Semi monthly __ other

Spouse's gross pay? _____ Weekly __ Monthly __ Bi-Weekly __ Semi monthly __
other

Other earnings? _____ Weekly __ Monthly __ Bi-Weekly __
Semi monthly __ other

Gross earnings of others living in household? _____ Weekly __ Monthly __ Bi-Weekly __
Semi monthly __ other

Your total monthly income \$ _____

Your spouse's monthly income \$ _____

Print Name _____

Signature _____ **Date** ___/___/___

BRING THE FOLLOWING TO THE CONSULTATION:

- 1) **6 MONTHS OF PAY STUBS**
- 2) **MOST RECENT TAX RETURN**
- 3) **CLOSING BINDER FOR PURCHASE OF YOUR HOME**
- 4) **MOST RECENT LETTERS FROM IRS OR STATE TAX AGENCY.**