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|------------------------------|
| MyCase Contact |
| Update SL |
| MyCase Client |
| Invoiced |
| Need MT to determine chapter |
| Assigned to |
| |

| |
|--|
| _____ Ch 7 Anticipated fees \$ _____ Pd. Consult fee: \$ _____ |
| _____ Ch 13 – Retainer \$ _____ Estimated payment \$ _____ |
| Retainer Pd. _____ Date: _____ |
| PIF Date: _____ |

**R. "TREY" ARVIZU, III, ATTORNEY
INITIAL INTAKE SHEET**

We are a debt relief agency. We help people file for bankruptcy relief under the bankruptcy code. Please fill this out to the best of your ability. Any errors, omissions or incorrect information may affect the advice provided to you by our office.

Today's Date: _____

Full LEGAL Name: _____

Full LEGAL Name of Spouse: _____

Marital status: Married/Single/Divorced/Widowed (Circle one)

Other names you use or have gone by in the last 6 years: _____

Date of Birth: _____ Date of Birth: _____

Social Security Number: _____ Social Security Number _____

Street address: _____ City: _____ Zip: _____

Complete Mailing Address (if different than street address):
 _____ City: _____ Zip: _____

Daytime phone number: _____ Cell: _____

e-mail address: _____

Have you been a resident of the State of New Mexico for the past two years: Yes/ No (Circle one) **If no:** Please list state or states where you lived and prior addresses and dates you lived there:

Have you ever filed bankruptcy before: Yes/ No (Circle one) If **yes**, which state did you file in and when:

| Who do you owe money to? | Total Amount Owed |
|--|-------------------|
| Credit cards | \$ _____ |
| Medical bills | \$ _____ |
| Personal loans | \$ _____ |
| Payday loans | \$ _____ |
| Collection account | \$ _____ |
| Cell phone/Utilities (that you are late on – Not your current accounts) | \$ _____ |
| Friends/Family | \$ _____ |
| Miscellaneous | \$ _____ |
| Student loans | \$ _____ |
| Taxes (state and federal) | \$ _____ |
| Child support/Alimony | \$ _____ |
| Court ordered debt/restitution | \$ _____ |
| Leases or contracts: | \$ _____ |
| Deficiencies/Repossessions | \$ _____ |

Has any of your debt been incurred within the past 60 days: Yes/ No (Circle One)

If yes, please explain: _____

Is anyone suing you at this time or are there any judgments against you? _____

Real Estate/home: Desc. _____

value of home: _____ Who do you make payments to: _____

Principal balance: _____ Monthly payment: _____

Are you current at this time: Yes/ No (Circle One) If not current, amount you are behind
\$ _____ Do you want to keep this property? YES/NO

Do you own or is your name on the deed of any other land, buildings or real estate: Yes/ No (Circle One)
Have you ever owned any other real estate YES/NO

Vehicle 1 (Year/Make/Model): _____

Who do you make payments to: _____

Balance: _____ Monthly payment: _____

Are you current on your vehicle payment: Yes/ No (Circle One) Do you want to keep this vehicle Yes/No (Circle One)

Vehicle 2 1 (Year/Make/Model): _____

Who do you make payments to: _____

Balance: _____ Monthly payment: _____

Are you current on your vehicle payment: Yes/ No (Circle One) Do you want to keep this vehicle Yes/No (Circle one)

Do you own or is your name on the title of any other vehicles (Boats, Campers, RV, motorcycles, etc.) : Yes/ No (Circle one)

Do you make payments on any appliances; furniture; electronics, computers? Yes/ No (Circle one) If yes, who do you make payments to and what are you purchasing:

Balance owed: _____ Payment amount: _____

Are you current? Yes/ No (Circle one) Do you want to keep? Yes/No (Circle one)

Did you co-sign for any debt that you do not make the payments on: Yes/ No (Circle one)

Do you expect to receive any inheritances (has any member of your family passed away and you might be left with any property or money): Yes/ No (Circle one)

Do you have any claims against anyone for any reason (such as personal injury or wrongful termination) or does anyone owe you any money: Yes/ No (Circle one)

Do you expect any lump sums of money for any reason? Yes/No (Circle one)

Have you transferred, sold or given anything of value to anyone in the last four years? Yes/No (Circle one)

Do you have any bank accounts at Wells Fargo Bank? Yes/No (Circle one)?

If you are purchasing a vehicle through a credit union, do you also have a credit card and/or personal loan with the same credit union? Yes/No (Circle one). Do you have a bank account at the same credit union? Yes/No (Circle one)

| Yourself | | Spouse | |
|---|--|---|--|
| Monthly gross income (before taxes/insurance) | Source (employment, self-employment, social security, rental income, food stamps, child/spousal support, unemployment, etc.) | Monthly gross income (before taxes/insurance) | Source (employment, self-employment, social security, rental income, food stamps, child/spousal support, unemployment, etc.) |
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| | | | |
| | | | |

Name/address of employer: _____

Occupation: _____

How long have you worked there: _____

How often do you get paid: _____

How many people live in your household? Ages/gender: _____

Have you had any change (increase or decrease) in income in the last six months: Yes/ No (Circle one)

Name/address of employer: _____

Occupation: _____

How long have you worked there: _____

How often do you get paid: _____

Do you expect or anticipate any increase or decrease in income over the next year: Yes/ No (Circle one)

Have you filed all tax returns for the past two years: Yes/ No (Circle one)

I hereby authorize the Arvizulaw.com, Ltd. to provide me with bankruptcy assistance. I hereby acknowledge receipt of the Statement of Information/Disclosures Required by 11 U.S.C. §341 and §528.

Signature

Signature