

INITIAL MEETING CLIENT FACT SHEET

Please complete this form and bring it to your first appointment at the Law Office of Paul Toscano, P.C.

PERSONAL & HOUSEHOLD INFORMATION:

1. Your Name: _____

Your Address (street, city, county): _____

Your Cell Phone Number: _____

Your Personal Email Address: _____

Your Spouse's Name: _____

Your Spouse's Cell Phone Number: _____

2. Is your spouse planning on filing bankruptcy with you? yes no uncertain no spouse

3. Have you filed a bankruptcy case in the last 8 years? yes no uncertain

4. Has your spouse filed bankruptcy case in the last 8 years? yes no uncertain no spouse

5. Have you lived in Utah continuously in the last 2 years? yes no uncertain

If your answer is no: In what State did you live before you moved to Utah? _____

6. Has spouse lived in Utah continuously in the last 2 years? yes no uncertain no spouse

If your answer is no: In what State did your spouse live before moving to Utah? _____

7. Write the number of people in your household (you, spouse, kids and others you support): _____

8. Write down the date of your first appointment with this law office : _____

9. Write down the last day of the calendar month prior to the month you wrote in line 8: _____

10. Write down the first day of the month that is 6 months prior to the date in line 9: _____

NOTE: The 6-month period between the dates in lines 9 and 10 is the ELIGIBILITY PERIOD.

INCOME:

11. Total of your gross (before tax) income during ELIGIBILITY PERIOD (include GROSS earnings, commissions, bonuses, unemployment and welfare payments, child support, alimony, self employment draws, rental and contract income BUT NOT SOCIAL SECURITY INCOME OF ANY KIND: \$ _____

12. Write down the same gross income information in line 11, but for your spouse: \$ _____

13. Add line 11 and 12 (total household gross income 6 months) \$ _____

14. Multiply line 13 by 2 (total household gross income annualized) \$ _____

15. Divide line 14 by 12: (average monthly gross household income) \$ _____

DEBT:

16. Total of your secured debt (that is, debt secured by property you own, such as the debt secured by your house, car, furniture, or other items you are purchasing or leasing, including property tax (add up the total pay off amount of each such debt , not just the monthly payments): \$ _____

17. Total unsecured debt (unsecured debt is debt that is not secured by collateral such as credit card debt, signature loans, guarantees, promissory notes, verbal promises to pay; don't include expenses paid to zero each month, such as utilities, insurance premiums, dues): \$ _____

18. Total of all other debt not included above: \$ _____

19 Total of lines 16, 17, and 18: \$ _____

ASSETS:

20. List the major items of property you do not want to lose, its value and the debt owed on it:

Property	Auction or garage sale value	Debt
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

22. What are your 5 most urgent questions?

- 1.
- 2.
- 3.
- 4.
- 5.

24. Number of creditors: _____ Number of business in the last 8 years: _____

23. If you think you are likely to hire this law office as bankruptcy counsel, then bring with you a cash down payment in an amount you feel comfortable paying so an engagement agreement can be signed at the first meeting; this down payment goes toward your fees, which start at about \$1,000.00 for a straightforward Chapter 7 and at about \$1750.00 for a Chapter 13; these quotes are estimates only and may not apply to your case. Write your estimated down payment, if any: \$ _____

Date you filled out this form: _____

Your Signature: _____

Your Spouse's signature: _____ (optional)