

Initial Consultation Worksheet

CLIENT NAME: _____ **Tele#:** _____ **DATE:** _____

Found Us Through: _____ **Address:** _____

Bankruptcy in last 8 years? Y / N **If Yes, what chapter?** 7 / 13 **Discharge Received?** Y / N

WA Resident for at least Last 2 Years? Yes / No [other state(s) _____]

=====
 IC Conducted by: RCR / SR / EM

1. Car/Other Secured Claims

<i>Creditor</i>	<i>Collateral</i>	<i>Fair Mkt Value</i>	<i>Debt Owed</i>	<i>Equity</i>	<i>Arrears?</i>	<i>365/ 910 claim?</i>	<i>Try to Keep?</i>
							Y / N / ??
							Y / N / ??
							Y / N / ??
							Y / N / ??
							Y / N / ??

2. Home Claims

<i>Creditor</i>	<i>Fair Mkt Value</i>	<i>Debt Owed</i>	<i>Equity</i>	<i>Arrears?</i>	<i>Foreclosure?</i>	<i>Try to Keep?</i>
						Y / N / ??
						Y / N / ??
						Y / N / ??

3. Attached Debt Issues - Reviewed with client (ATTACH) Y / N

4. Unsecured Debt: \$ _____ (Total Est.) → CC = \$ _____ Std = \$ _____ Tax = \$ _____
 Med = \$ _____ Sprt = \$ _____ 523 = \$ _____

5. Tax Returns: Are all tax returns filed? Y / N → **Unfiled:** FED: _____ STATE: _____

6. Owes Money to Current Bank/CR UN? Y / N **Gross Income:** DR: \$ _____ SP: \$ _____

7. Wells Fargo Deposits? Y / N **Household Size:** _____

8. Issues: 109/362? prior+ None apparent; Maybe; Definite Issue: _____
 522? exemption None apparent; Maybe; Definite Issue: _____
 523? discharge None apparent; Maybe; Definite Issue: _____
 547? preference None apparent; Maybe; Definite Issue: _____
 548? f-convey None apparent; Maybe; Definite Issue: _____
 707b? abuse None apparent; Maybe; Definite Issue: _____

NOTES:

- (1) Above Median? Y / N ? Advised client of general fee est. (\$1,499 - \$1,750 +)
- (2) ANY Business Issues? Y / N? Advised client of general fee est. (\$2,500 - \$5,000 BUT reduced if truly SIMPLE)
- (3) Actual fee ESTIMATE given? \$ _____ Because _____

[Make sure client gets their copy of Initial Consultation Agreement] _____