

# Consultation

<b>Client Name(s):</b>					
Address:					
Debtor Phone:		Cell:		Email:	
Spouse Phone:		Cell:		Email:	
Household Size:					
Dependents / Ages:				Anticipated Filing Month:	
<b>Identifying Factors</b>		✓	✓	✓	✓
<b>Equity</b>	<b>Yes</b>	<b>No</b>	<b>Income Sources</b>		<b>Yes</b>
					<b>No</b>
Primary Residence < \$150,000	<input type="checkbox"/>	<input type="checkbox"/>	Business Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Rental Property	<input type="checkbox"/>	<input type="checkbox"/>	Employment	<input type="checkbox"/>	<input type="checkbox"/>
Time Share	<input type="checkbox"/>	<input type="checkbox"/>	Child / Spousal Support	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Home	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Income	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle 1 < \$5,000	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Disability	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle 2 < \$5,000	<input type="checkbox"/>	<input type="checkbox"/>	Workers' Compensation	<input type="checkbox"/>	<input type="checkbox"/>
Bank Balance < \$150 or \$300	<input type="checkbox"/>	<input type="checkbox"/>	Unemployment	<input type="checkbox"/>	<input type="checkbox"/>
Jewelry < \$2,000	<input type="checkbox"/>	<input type="checkbox"/>	Income Stable	<input type="checkbox"/>	<input type="checkbox"/>
Projected A/R (25% to Trustee)	<input type="checkbox"/>	<input type="checkbox"/>	Income Going Down	<input type="checkbox"/>	<input type="checkbox"/>
Machinery/Equipment < 5,000 (Business)	<input type="checkbox"/>	<input type="checkbox"/>	Income Going Up	<input type="checkbox"/>	<input type="checkbox"/>
Interest in Probate Estate	<input type="checkbox"/>	<input type="checkbox"/>	Personal Injury Claim	<input type="checkbox"/>	<input type="checkbox"/>
Anticipated Tax Refunds	<input type="checkbox"/>	<input type="checkbox"/>	Law Suits, Insurance Claims, etc.	<input type="checkbox"/>	<input type="checkbox"/>
Whole Life Insurance Policy(s)	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to Household	<input type="checkbox"/>	<input type="checkbox"/>
Whole Life Insurance Loans	<input type="checkbox"/>	<input type="checkbox"/>	Personal Loans	<input type="checkbox"/>	<input type="checkbox"/>
Term Life Insurance Policy(s)	<input type="checkbox"/>	<input type="checkbox"/>			
Retirement Accounts: IRA, 401(k), Other	<input type="checkbox"/>	<input type="checkbox"/>	<b>Debts</b>		
Interest in Corporation, LLC, Trust, Other	<input type="checkbox"/>	<input type="checkbox"/>	All Tax Returns Filed	<input type="checkbox"/>	<input type="checkbox"/>
Exposed / Unexempt Assets	<input type="checkbox"/>	<input type="checkbox"/>	Federal / State Tax Deficiency	<input type="checkbox"/>	<input type="checkbox"/>
Asset or No Asset-Case	<input type="checkbox"/>	<input type="checkbox"/>	First Mortgage / Rent Payment	<input type="checkbox"/>	<input type="checkbox"/>
<b>Urgency / Timing Issues</b>			Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Foreclosure / Trustee Sale / Eviction	<input type="checkbox"/>	<input type="checkbox"/>	Second Mortgage Payment	<input type="checkbox"/>	<input type="checkbox"/>
CMI (Current Monthly Income) Is Going Up	<input type="checkbox"/>	<input type="checkbox"/>	Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Secured Debt < 1,081,400 (13 Limit)	<input type="checkbox"/>	<input type="checkbox"/>	Child / Spousal Support Payment	<input type="checkbox"/>	<input type="checkbox"/>
Unsecured Debt < 360,475 (13 Limit)	<input type="checkbox"/>	<input type="checkbox"/>	Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Law Suits / Judgments	<input type="checkbox"/>	<input type="checkbox"/>	Car 1 Free & Clear or Pymt	<input type="checkbox"/>	<input type="checkbox"/>
Wage Garnishment	<input type="checkbox"/>	<input type="checkbox"/>	Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Divorce	<input type="checkbox"/>	<input type="checkbox"/>	Car 2 Free & Clear or Pymt	<input type="checkbox"/>	<input type="checkbox"/>
Car Accidents	<input type="checkbox"/>	<input type="checkbox"/>	Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Transferred Assets	<input type="checkbox"/>	<input type="checkbox"/>	Car 3 Free & Clear or Pymt	<input type="checkbox"/>	<input type="checkbox"/>
Repossessions	<input type="checkbox"/>	<input type="checkbox"/>	Payments Behind	<input type="checkbox"/>	<input type="checkbox"/>
Property Held For Another Person	<input type="checkbox"/>	<input type="checkbox"/>	Student Loans	<input type="checkbox"/>	<input type="checkbox"/>
False Financial Statements	<input type="checkbox"/>	<input type="checkbox"/>	Medical Debts	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver to Disabled / Senior (65)	<input type="checkbox"/>	<input type="checkbox"/>	Credit Cards	<input type="checkbox"/>	<input type="checkbox"/>
Health / Medical Procedures	<input type="checkbox"/>	<input type="checkbox"/>	Credit Cards Used In Last 90 Days	<input type="checkbox"/>	<input type="checkbox"/>
Pre-Filing Credit Counseling Completed	<input type="checkbox"/>	<input type="checkbox"/>	Cash Advances In Last 70 Days	<input type="checkbox"/>	<input type="checkbox"/>
Needs Credit Reports (\$35 per debtor)	<input type="checkbox"/>	<input type="checkbox"/>	Payday Loans	<input type="checkbox"/>	<input type="checkbox"/>
<b>Filing</b>			Cosigner on Loans	<input type="checkbox"/>	<input type="checkbox"/>
Chapter 7	<input type="checkbox"/>	<input type="checkbox"/>	Loans from Friends or Family	<input type="checkbox"/>	<input type="checkbox"/>
Chapter 13	<input type="checkbox"/>	<input type="checkbox"/>	Debts to Family-Owned Businesses	<input type="checkbox"/>	<input type="checkbox"/>
Filed Bankruptcy Within Last 8 Years	<input type="checkbox"/>	<input type="checkbox"/>	Assists Disabled Outside of Home	<input type="checkbox"/>	<input type="checkbox"/>
Resided in Arizona Minimum 180 Days	<input type="checkbox"/>	<input type="checkbox"/>	<b>Other</b>		
Non-Consumer/Business Case	<input type="checkbox"/>	<input type="checkbox"/>	Credit Counseling in Last 180 Days	<input type="checkbox"/>	<input type="checkbox"/>
			Order Credit Reports	<input type="checkbox"/>	<input type="checkbox"/>

