

# Client Information

Thank you for choosing the Law Office of Jack G. Lezman. Please take a moment to complete the following information and then return the form to the receptionist. **(Please complete both sides)**

Your Name: \_\_\_\_\_ County you live in: \_\_\_\_\_

Mailing address: \_\_\_\_\_  
Street City State Zip

Spouse Name: \_\_\_\_\_

Spouse Address (if different): \_\_\_\_\_

**Telephone Numbers:**

Home: (\_\_\_\_) \_\_\_\_\_  
Husband Work (\_\_\_\_) \_\_\_\_\_  
Wife Work: (\_\_\_\_) \_\_\_\_\_

**Email :** \_\_\_\_\_

Husband Cell:(\_\_\_\_) \_\_\_\_\_  
Wife Cell:(\_\_\_\_) \_\_\_\_\_

How did you hear of us? **Bell South Yellow Pages Referral:** \_\_\_\_\_ **Yellow Book Other:** \_\_\_\_\_ **Received Letter From Us**

Have you met with us before? ..... Yes / No

**If "yes" when did we see you?** \_\_\_\_\_

Have you received written notice or a foreclosure hearing on your home? ..... Yes / No

**If "yes" what is your hearing date:** \_\_\_\_\_

Have you received notification of an foreclosure sale date for your home?..... Yes / No

**If "yes" what is your foreclosure sale date:** \_\_\_\_\_

Have you had a vehicle repossessed in the last 10 days? ..... Yes / No

**If "yes" what was your repossession date:** \_\_\_\_\_

Is your vehicle in danger of repossession? ..... Yes / No

**Please provide a best estimate on all applicable figures Do not leave any blanks.**

**Real Estate:**

House: Market Value \_\_\_\_\_ Rental Property: Market Value \_\_\_\_\_  
Amount Owed 1<sup>st</sup> Mortgage \_\_\_\_\_ Amount Owed \_\_\_\_\_  
Amount Owed 2<sup>nd</sup> Mortgage \_\_\_\_\_ Time share: Market Value \_\_\_\_\_  
Total Arrears if any: \_\_\_\_\_ Amount Owed \_\_\_\_\_

Burial Plot: Market Value \_\_\_\_\_ Other: \_\_\_\_\_ Market Value \_\_\_\_\_  
Amount Owed \_\_\_\_\_ Amount Owed \_\_\_\_\_

**Vehicles Titled in Your Name (car, truck, motorcycle, boat, etc.)**

*Please list all vehicles even if they are paid for.*

Vehicle One: year \_\_\_\_\_ make \_\_\_\_\_ model \_\_\_\_\_  
how much do you owe? \_\_\_\_\_ Who's name is it in? \_\_\_\_\_  
Vehicle Two: year \_\_\_\_\_ make \_\_\_\_\_ model \_\_\_\_\_  
how much do you owe? \_\_\_\_\_ Who's name is it in? \_\_\_\_\_  
Vehicle Three: year \_\_\_\_\_ make \_\_\_\_\_ model \_\_\_\_\_  
how much do you owe? \_\_\_\_\_ Who's name is it in? \_\_\_\_\_

**Exact Figures are not necessary, please provide your best estimate**

**Bank Accounts / Other Assets:**

Checking Balance:(average) \_\_\_\_\_ Retirement plans: \_\_\_\_\_  
Savings Balance:(average) \_\_\_\_\_ Stocks/Bonds: \_\_\_\_\_  
Expected tax refund \_\_\_\_\_ Life Ins. Cash Value \_\_\_\_\_  
Other assets (please specify type) \_\_\_\_\_

**What would you say is the approximate total amount of your unsecured debt?**

Credit Cards \_\_\_\_\_ Repossession Debt \_\_\_\_\_  
Medical Bills \_\_\_\_\_ Installment payments \_\_\_\_\_  
Personal Loans \_\_\_\_\_ for furniture, computer, etc. \_\_\_\_\_  
Back Taxes: IRS \_\_\_\_\_ Back Child Support \_\_\_\_\_  
State \_\_\_\_\_ Student Loans \_\_\_\_\_  
Property \_\_\_\_\_ Other: \_\_\_\_\_

**Current Monthly Gross HOUSEHOLD Income from:** (Please fill in all that apply)

Employment \_\_\_\_\_ Retirement \_\_\_\_\_  
Unemployment \_\_\_\_\_ Social Security \_\_\_\_\_  
Rental Income \_\_\_\_\_ Child/Spousal Support \_\_\_\_\_  
Other Income \_\_\_\_\_

**Financial Affairs:**

Do you own (or have you owned) your own business within the last 6 years?..... Yes / No  
do you have inventory and/or tools for the business (assets / accounts receivable)?. Yes / No  
Do you receive money from an annuity or a trust?..... Yes / No  
Have you sold or transferred anything out of your name in the last 12 months?..... Yes / No  
Have you made any large purchases in the last 90 days?..... Yes / No  
Have you taken out any loans or cash advances in the last 90 days?..... Yes / No  
Have you given any loan company a list of your household goods?..... Yes / No  
Have you listed any motor vehicles as collateral for a personal loan?..... Yes / No  
Have you co-signed a loan for anyone or has anyone co-signed for you?..... Yes / No  
Has anyone served you with any Court papers (lawsuits) in the last 3 years?..... Yes / No  
Does anyone have a judgment against you?..... Yes / No  
Are there any tax returns you did not file? ..... Yes / No  
If "yes" which years? \_\_\_\_\_  
Have you ever filed bankruptcy before?..... Yes / No  
If "yes" when? \_\_\_\_\_ where? \_\_\_\_\_  
If "yes" have you had a bankruptcy case dismissed  
(kicked out of court) in the last 12 months?..... Yes / No  
Have you used any credit cards in the last 60 days (purchased &/or cash advances)..... Yes / No  
Have you resided in another state within the past two years..... Yes / No

\_\_\_\_\_  
(for office use only)

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Estimated Payments: 36 months \_\_\_\_\_ 48 months \_\_\_\_\_ 60 months \_\_\_\_\_