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New Client Information Sheet

Date:	<u> </u>			
Name:	Social Security #	Present		
Address:	C	City:		
Telephone: Home	Work	Zip		
Email Address				
Employers Name and Hour	rly/monthly/annual salary:			
Name of Spouse:	Social Sec. #	Present		
Spouse's Employer:	Telephone:			
Spouse pay	Client Email address _			
PLEASE FILL OUT COMPLET	TELY, estimate amounts if y	ou are not sure		
1st mtg 2nd	payoff mo pmt value			
Do you own any other re	eal estate?			
Automobiles, boats, 4 w Make, model	wheelers, etc., whether you monthly	owe on them or not months		
& year 1st	Loan Co payoff pymt	value now due		
veh				

Have you given any creditors a list of your furniture when you borrowed money from them? If so, list these creditors:

have you financed any creditors that	-		or appliances through
Do you owe money t Alimony Child Support Student Loans		amount owed, and to	who)
taxes are owed for due (ie usually du	r, when the retu ne 4/15 of the fo ou do not have th	rn was filed, and whe ollowing year, later	ear show the year the en the tax return was if an extension was you can estimate but
Taxes owed	du	e for year	<u></u>
Taxes owed	du	e for year	<u> </u>
List major unsecur When did you last When was the last What is the total Credit cards for (do not include i	rn: did you get a red debts: (estin charge anything cash advance on amount charged the last 2 month interest or late	a refund or owe? mate amounts owed) on a credit card? a credit card? plus total cash advar hs \$ for the l charges for the above name of creditor	nces on all last 6 months \$ ve line)
			<u> </u>

Do you owe any money to relatives? Have you repaid any loans to relatives the last 2 years?
If so, to who and how much
Have you made any gifts to family or friends of items worth more than \$500 in
the last 4 years? If so to who and what Have you transferred any cars, land, or anything else worth more than \$500
from your name to anyone else in the last 4 years?
If so to who and what?
Are you suing anyone, or do you have the right to sue anyone?
If you have any type of pension, retirement plan, profit sharing plan, stock
option plan, or annuity: put down name and approximate
amount of money in plan here:
Other than furniture, clothes & jewelry, do you have anything else worth over \$250.00
\$250.00
Hhg/clothg/jewly <
Where did you hear about this office:
Do not write below this line
(1) DEADLINES:
(2) Notes:
(3) Special Instructions:
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