

Date:

Michael Barnett, PA

Michael Barnett, Esq. Board Certified --Consumer Bankruptcy Law --American Board of Certification www.tampabankruptcy.com

Law Office Main Office & Mailing Address: 506 N. Armenia Ave. Tampa, FL 33609-1703 Appointments also available at: Dade City: 38100 Meridian Ave., Dade City email: mbarnett@tampabankruptcy.com



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## **New Client Information Sheet**

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	city:
Work	Zip
thly/annual salary:	
_ Social Sec. #	Present
Telephone:	
ient Email address	
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ate?	
—	u owe on them or not months value now due
	thly/annual salary: Social Sec. # Telephone: ient Email address stimate amounts if y f mo pmt value ate? s, etc., whether you monthly

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 furniture, electronics, jewelry or appliances through any creditors that you still owe money to? Do you owe money to: (if yes, put amount owed, and to who) Alimony \_\_\_\_\_ Child Support \_\_\_\_\_ Student Loans \_\_\_\_\_ Do you owe money to the IRS? If so for each year show the year the taxes are owed for, when the return was filed, and when the tax return was due (ie usually due 4/15 of the following year, later if an extension was requested). If you do not have this information now, you can estimate but note that it is an estimate. Taxes owed \_\_\_\_\_ due for year \_\_\_\_\_ Taxes owed due for year Have you filed all tax returns due? For the 2018 return: did you get a refund or owe? List major unsecured debts: (estimate amounts owed) When did you last charge anything on a credit card? \_\_\_\_\_ When was the last cash advance on a credit card? \_\_\_\_ What is the total amount charged plus total cash advances on all Credit cards for the last 2 months \$\_\_\_\_\_ for the last 6 months \$\_\_\_\_\_ (do not include interest or late charges for the above line) name of creditor amount owed name of creditor amount owed \_\_\_\_\_ \_\_\_\_ \_\_\_\_\_ \_\_\_\_ \_\_\_\_\_\_ \_\_\_\_ \_\_\_\_\_ \_ \_ \_ \_

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 \$5	00 in
the last 4 years? If so to who and what	
Have you transferred any cars, land, or anything else worth more than \$5	00
from your name to anyone else in the last 4 years?	
If so to who and what?	
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

Hhg/clothg/jewly <</pre>

Where did you hear about this office:

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(1) DEADLINES:

(2) Notes:

(3) Special Instructions: