

Ralston Buchanan, PLLC

A Consumer Protection Law Firm

Client Intake Form

Date

Full Legal Name

Office File Number

How did you hear about us?

Contact Information

Home Phone

Cell Phone Text: Yes or No

Email Address

Address

City

State

ZIP Code

Job Title, Address, & How Long Employed

Primary Source of Income if NOT Employed

DOB

Social Security Number

Single / Married / Separated / Divorced

Are you known by any other names?

Spouse Full Legal Name

Spouse Social Security Number



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1. Have you filed bankruptcy within the past 10 years?

2. Are you expecting any significant changes in household income or expenses soon (six months)?

3. Are you self-employed in any way?

4. Do you have, or have you recently had, any ownership interest in or been an officer of corporation or LLC?

5. Have you cosigned, or anyone else cosigned for you, on any loans or installment purchases?

6. Do you have any existing debts for which you used collateral? Examples are a title loan or using household goods for a personal loan, etc.

7. Do you have any interest in any real estate or land?

8. Do you rent your current residence?

9. If you rent, are you current in your rent payments? Has the landlord filed an eviction suit against you?

10. Have you lived at your current address for more than 3 years?



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11. Please state the total number of people who live in your home.

12. Please state the total number of vehicles that you own or lease right now. Include all cars, trucks, motorcycles, boats, airplanes, campers, ATV's etc. that have your name on the title, lease and/or registration.

13. Are there any debts related to any of these vehicles?

14. Have you ever had a vehicle repossessed?

15. Are there any debts related to anything else you own such as furniture, appliances, electronics, etc.?

16. Have you sued anyone recently? Or believe you might have the right to sue anyone now?

17. How many bank accounts have your name on them and what type of accounts are they?

18. Do your accounts show any deposits not related to payroll in the last year?

19. Do your accounts show any withdrawals/transfers other than normal reasonable living expenses?

20. Do you have any Annuity or Retirement Accounts or Income?

