

CLIENT QUESTIONNAIRE  
ANSWER ALL QUESTIONS, PRINT CLEARLY

FULL NAME:      FIRST      \_\_\_\_\_  
                         MIDDLE      \_\_\_\_\_  
                         LAST      \_\_\_\_\_

Social Security #      \_\_\_\_\_      Date of Birth      \_\_\_\_\_  
Physical Address      \_\_\_\_\_      Mailing Address      \_\_\_\_\_  
                         \_\_\_\_\_      \_\_\_\_\_  
cell #      \_\_\_\_\_      home #      \_\_\_\_\_      work #      \_\_\_\_\_  
email address      \_\_\_\_\_

Place of Employment      \_\_\_\_\_      Length      \_\_\_\_\_  
Salary      \_\_\_\_\_      Position      \_\_\_\_\_

Any other money coming into the house (retirement, social security, VA, part-time job, etc.)

\_\_\_\_\_

SPOUSE'S NAME:      FIRST      \_\_\_\_\_  
                         MIDDLE      \_\_\_\_\_  
                         LAST      \_\_\_\_\_

Social Security #      \_\_\_\_\_      Date of Birth      \_\_\_\_\_  
Physical Address      \_\_\_\_\_      Mailing Address      \_\_\_\_\_  
                         \_\_\_\_\_      \_\_\_\_\_  
cell #      \_\_\_\_\_      home #      \_\_\_\_\_      work #      \_\_\_\_\_  
email address      \_\_\_\_\_

Place of Employment      \_\_\_\_\_      Length      \_\_\_\_\_  
Salary      \_\_\_\_\_      Position      \_\_\_\_\_

Any other money coming into the house (retirement, social security, VA, part-time job, etc.)

\_\_\_\_\_

How did you hear about us?      \_\_\_\_\_

INTAKE QUESTIONS:

1. Are you renting or purchasing your home? \_\_\_\_\_

Rent:

How much is the monthly payment? \_\_\_\_\_

Are you behind on these payments? \_\_\_\_\_

If purchasing: (First Mortgage)

What do you think your house is worth? \_\_\_\_\_

When did you get this mortgage? \_\_\_\_\_

How much is the monthly payment? \_\_\_\_\_

How much do you still owe on this loan? \_\_\_\_\_

Who do you make the payments to? \_\_\_\_\_

Are you behind on these payments? \_\_\_\_\_

How many months? \_\_\_\_\_

Do you want to keep your house? \_\_\_\_\_

If purchasing: (Second Mortgage)

When did you get this loan? \_\_\_\_\_

How much is the monthly payment? \_\_\_\_\_

How much do you still owe on this loan? \_\_\_\_\_

Who do you make the payments to? \_\_\_\_\_

Are you behind on these payments? \_\_\_\_\_

How many months? \_\_\_\_\_

Do you owe any other money on this house (HOA taxes)? \_\_\_\_\_

2. Do you have any other real estate, time shares, heir property, life estates? \_\_\_\_\_

3. Where do you bank? (all accounts even if they are empty)

(1) \_\_\_\_\_ Type account? \_\_\_\_\_

(2) \_\_\_\_\_ Type account? \_\_\_\_\_

Closed any bank accounts within the past year? \_\_\_\_\_

4. List household goods.

5. Do you have an insurance policy? \_\_\_\_\_

If yes, is it term or cash value policy? \_\_\_\_\_

6. Do you have any stocks, annuities, bonds? \_\_\_\_\_

7. Do you have an IRA or retirement fund? \_\_\_\_\_

8. Do you have a business? If yes what is the name of it? \_\_\_\_\_

If you have a business, list tools/inventory/equipment. \_\_\_\_\_

9. Anybody owe you any money (alimony, accounts receivable, child support)? \_\_\_\_\_

10. Do you have to pay child support or alimony to anyone?

Name \_\_\_\_\_ How much monthly? \_\_\_\_\_

Address \_\_\_\_\_ Are you behind? \_\_\_\_\_

\_\_\_\_\_ Deducted from paycheck? \_\_\_\_\_

11. Has anyone related to you died or is going to die? \_\_\_\_\_

12. Please list ALL vehicles in your name. This includes paid for and financed cars, trucks, boats, trailers, motorcycles, wrecked, driven by children, junked.

	1	2	3
Yr/make model	_____	_____	_____
Mileage	_____	_____	_____
Date purchased	_____	_____	_____
Finance Company	_____	_____	_____
Monthly payment	_____	_____	_____
Payoff	_____	_____	_____
Behind on payment	_____	_____	_____
Keep or give up?	_____	_____	_____
	4	5	6
Yr/make model	_____	_____	_____
Mileage	_____	_____	_____
Date purchased	_____	_____	_____
Finance Company	_____	_____	_____
Monthly payment	_____	_____	_____
Payoff	_____	_____	_____

Behind on payment \_\_\_\_\_

Keep or give up? \_\_\_\_\_

13. If you have a business, please list office inventory.

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14. Do you have any lawsuits pending? \_\_\_\_\_

15. Who else lives in the house with you?

	1	2	3	4	5
Age?	_____	_____	_____	_____	_____
Sex?	_____	_____	_____	_____	_____
Relationship	_____	_____	_____	_____	_____
Monthly \$ contrib.	_____	_____	_____	_____	_____

16. Do you have computer access? \_\_\_\_\_

17. Have you ever filed bankruptcy before? \_\_\_\_\_ What chapter? \_\_\_\_\_

When? \_\_\_\_\_ Where? \_\_\_\_\_

18. Debts.....

How much do you owe to credit cards? \$ \_\_\_\_\_

How much have you charged in the past 3 months? \$ \_\_\_\_\_

How much do you owe to medical bills? \$ \_\_\_\_\_

How much do you owe to loan companies?  
(Citifinancial, Am. General, etc.) \$ \_\_\_\_\_

How much do you owe to the IRS? \$ \_\_\_\_\_

How much do you owe to state taxes? \$ \_\_\_\_\_

How much do you owe for student loans? \$ \_\_\_\_\_