



Date:

Personal Information (Client #1)

Full Name:

Email:

Address:

Phone:

City:

State:

Zip Code:

Occupation:

Age:

Number of dependent children of any age:

Have you lived in Michigan for the last 2 years?

Yes

No

If no, in what city and state did you live?

Information about spouse, if married (Client #2)

Full Name:

Email:

Address:

Phone:

City:

State:

Zip Code:

Occupation:

Age:

Number of dependent children of any age:

Have you lived in Michigan for the last 2 years?

Yes

No

If no, in what city and state did you live?

Marital Status

Never married

Married, living together

Married, living apart

Domestic partner

Divorced, date:

Widowed

How did you first hear about us?

Google

Yahoo

Bing

Avvo

Referral:

Other:

Heidi L. Wolf | Laurie J. Tange | Emily W. Jipp

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Assets (Real Estate, Vehicles, Boats, etc.)

Real Estate

| Property | Address | Value | Mortgage Balance | Monthly Payments | Are the payments current? |
|------------------|---------|-------|--------------------------|--------------------------|------------------------------------|
| Home (Residence) | | | 1 st Mortgage | 1 st Mortgage | 1 st Mortgage Yes No |
| | | | 2 nd Mortgage | 2 nd Mortgage | 2 nd Mortgage Yes No |
| Other Property | | | 1st Mortgage | 1st Mortgage | 1st Mortgage Yes No |
| | | | 2 nd Mortgage | 2 nd Mortgage | 2 nd Mortgage Yes No |
| Other Property | | | 1 st Mortgage | 1 st Mortgage | 1 st Mortgage Yes No |
| | | | 2 nd Mortgage | 2 nd Mortgage | 2 nd Mortgage Yes No |

Do you rent? If so, list your monthly rental amount:

Vehicles (including boats, RVs, four wheelers, etc.)

| Vehicle (make, model and year) | Value | Loan Balance | Monthly Payments | Are the payments current? |
|--------------------------------|-------|--------------|------------------|---------------------------|
| | | | | Yes No |
| | | | | Yes No |
| | | | | Yes No |

Judgments

| Creditor | Amount of Judgment | Date of Entry | Nature of Debt (ex: credit card) |
|----------|--------------------|---------------|----------------------------------|
| | | | |
| | | | |

Total in Judgments:



Unsecured Debts
(those debts in which the creditor has no collateral securing the loan)

| Types of Debt | Number of Accounts/Cards | Total Owed | Are your payments current? |
|-----------------------|---------------------------------|-------------------|-----------------------------------|
| Credit Cards | | | |
| Personal Loans | | | |
| Medical Debts | | | |
| Student Loans | | | |
| Tax Debts | | | |
| Other Debts | | | |

Total in Unsecured Debts:

Income

Client #1 - List gross pre-tax income

(ex: employment, business, disability, rent, social security, VA benefits, gifts, or any other income REGARDLESS of whether it is taxable)

| Source | Annual Income |
|---------------|----------------------|
| | |
| | |
| | |

Do you expect any change in income? Yes No

If yes, please explain:



Client #2 (spouse, if married) – List gross pre-tax income

| Source | Annual Income |
|--------|---------------|
| | |
| | |
| | |

Do you expect any change in income?

If yes, please explain:

Other Assets

Do you have an ownership interest in any other assets worth more than \$5,000, other than retirement accounts?

Yes No

Notes / Comments

Please explain anything here that you believe may be relevant to your case.