

**THE LAW OFFICES OF
CHANCE M. MCGHEE**
8207 Callaghan Rd., Suite 250
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(210)-342-3400 FAX (210)-366-4791

Thank you for contacting us. It is our sincere desire to help you. Your answers on this form give us important information that will allow us to better help you. Please complete the entire form. If you do not know exact figures, please provide your best answer. Your answers are confidential. Please answer honestly.

PLEASE PRINT

DATE: _____ How did you hear about us? T.V Phonebook Newspaper Letter Internet Friend
Other Referred by: _____

NAME: _____ SPOUSE: _____

ADDRESS: _____ CITY, STATE, ZIP: _____

Home phone: _____ COUNTY: _____

Work phone: _____ Work phone: _____

Cell phone: _____ Cell phone: _____

E-mail address: _____ E-mail address: _____

Date of Birth: _____ Date of Birth: _____

Your occupation: _____ Spouse's occupation: _____

Employer: _____ Employer: _____

Length of Employment: _____ Length of Employment: _____

Martial Status: (circle one): Married Single (never married) Divorced Separated Widowed
How long? _____

Dependents living at home? (yes no) Ages? _____

How long have you lived in Texas? _____

Have you **EVER** filed bankruptcy?(yes no) How many times? _____ When/Chapter? _____

CASE EMERGENCIES:

Yes No

___ ___ Has your VEHICLE been repossessed? What date was it taken? _____

___ ___ Is your HOME or PROPERTY posted for foreclosure? What is the sale date? _____

___ ___ Are your WAGES being garnished? By whom?: _____

Secured Debts ("Secured" means if you don't pay, the creditor can take something away.)

Homes/Land/Real Estate of any kind (List ALL real estate you own, even if it is paid off.)

Address: _____

Mortgage Co. (if any): _____ Monthly Pmt. \$ _____

Payoff/Balance Due: \$ _____ Amt. Behind: \$ _____ Value: \$ _____

Second Mortgage (if any): _____ Monthly Pmt. \$ _____

Payoff/Balance Due: \$ _____ Amt. Behind: \$ _____

Real Estate Taxes Due? If so, how much and what years? _____

Yes No Is this property posted for foreclosure? What is the sale date? _____

Address of your second property: _____

Mortgage Co. (if any): _____ Monthly Pmt. \$ _____

Payoff/Balance Due: \$ _____ Amt. Behind: \$ _____ Value: \$ _____

Second Mortgage (if any): _____ Monthly Pmt. \$ _____

Payoff/Balance Due: \$ _____ Amt. Behind: \$ _____

Real Estate Taxes Due? If so, how much and what years? _____

Yes No Is this property posted for foreclosure? What is the sale date? _____

Vehicles (List ALL vehicles you own, even if they are paid for)

Creditor (if any): _____ Year/Make _____

Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____ Amt. Behind: \$ _____

Creditor (if any): _____ Year/Make _____

Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____ Amt. Behind: \$ _____

Creditor (if any): _____ Year/Make _____

Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____ Amt. Behind: \$ _____

Other Secured Debts (furniture/appliances, electronics, jewelry, RVs, motorcycles, boats, trailers, etc.)

Creditor: _____ Collateral: _____

Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____

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Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____

Creditor: _____ Collateral: _____

Balance Due: \$ _____ Payment: \$ _____ Value: \$ _____

IRS debt? Years: _____ Approximate total amount: _____

Yes No Have you filed all of your income tax returns for this year and previous years? If not, what years have you missed? _____

UNSECURED DEBTS: (All Other Debts)

What is the approximate total of all other debts you have? Include all other debts, even if you dispute the debt or it is "written off" or you want to continue paying it. Examples are: credit cards, payday loans, medical bills, signature loans, bad checks, etc.

Total unsecured debt: \$ _____

INCOME

Office Use

Pay period? (circle one) weekly, every 2 weeks, twice a month, monthly
How much is your take home pay? \$ _____ \$ _____

Spouse's pay period? (circle one) weekly, every 2 weeks, twice a month, monthly
How much is your spouse's take home pay? \$ _____ \$ _____

Please report your spouse's income even if you do not think he/she will be filing with you.

Other monthly household income **of any type** (circle the type) (second job, child support, food stamps, rental income, Social Security, etc.) \$ _____ \$ _____

1 - 38,294 2 - 55,178 3 - 56,445 4 - 65,477 more + 7,500 each

MONTHLY EXPENSES

Please estimate if you do not know exact amounts.

Office Use

Home mortgage payment or rent	\$ _____	\$ _____
Are real estate taxes included? (yes no)		
Is property insurance included? (yes no)		
Lot rental, land payment or homeowner's association.....	\$ _____	\$ _____
Electricity and heating fuel (natural gas/propane)	\$ _____	\$ _____
Water and Sewer	\$ _____	\$ _____
Telephone (regular land line)	\$ _____	\$ _____
Other (cable or satellite)	\$ _____	\$ _____
Home maintenance	\$ _____	\$ _____
Food (include groceries, toiletries, cleaning supplies)	\$ _____	\$ _____
Clothing	\$ _____	\$ _____
Laundry & Dry Cleaning	\$ _____	\$ _____
Medical & Dental expenses (not payroll deducted)	\$ _____	\$ _____
Transportation (gas/repairs/maintenance)	\$ _____	\$ _____
Recreation	\$ _____	\$ _____
Charitable contributions	\$ _____	\$ _____
Insurance (not deducted from wages or included in home mortgage payment)		
Homeowner's or renter's	\$ _____	\$ _____
Life	\$ _____	\$ _____
Health	\$ _____	\$ _____
Auto	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
Installment payments:		
Auto	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
Taxes (not deducted from wages or included in home mortgage payment)	\$ _____	\$ _____
Alimony, maintenance and support paid to others	\$ _____	\$ _____
Payments for support of additional dependents not living at your home	\$ _____	\$ _____
Other (cell phone)	\$ _____	\$ _____
Other (internet)	\$ _____	\$ _____
Other _____	\$ _____	\$ _____

OTHER MATTERS:

Yes No

- ___ ___ Do you have any insufficient funds (NSF) checks outstanding?
- ___ ___ Are any being collected by the district attorney?
- ___ ___ Are you behind on child or spousal support? Amount: \$ _____
- ___ ___ Do you have any judgments against you? Who took the judgment? _____
- ___ ___ Do you have any lawsuits pending? By whom? _____
- ___ ___ Have you received any cash advances, used balance transfers or credit card "convenience" checks in the last 12 months? If yes, how much? \$ _____
- Details: _____
- ___ ___ Is your employer or a creditor taking any deductions out of your paycheck or bank account for loans, car payments, payday loans etc. Details: _____
- ___ ___ Do you have any retirement (401K) loans? When do the loans pay off? _____
- ___ ___ Do you owe anything to family, friends, or business partners? How much? \$ _____
- How much have you paid them in the past 12 months? \$ _____
- ___ ___ Do you have a debt that is joint (cosigned) with someone else?
- With whom? _____ Relationship? _____
- ___ ___ Do you pay a debt that is in someone else's name? Whose name? What is the relationship?
- _____
- ___ ___ Have you **sold or given away** anything worth over \$1,000.00 to anyone in the past 24 months?
- What was sold or given away? _____
- How much was it worth at the time it was sold or given away? \$ _____
- Did you receive anything when you sold or gave it away? _____

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ATTORNEY'S RECOMMENDATION and FEE QUOTE

Client:

Date:

Chapter 13 Plan

Secured creditors	Amount	Payment
1.) _____	_____	_____
2.) _____	_____	_____
3.) _____	_____	_____
4.) _____	_____	_____
Priority creditors		
1.) _____	_____	_____
2.) _____	_____	_____
3.) _____	_____	_____
Attorney Fees:		100.00
TOTAL AMOUNT	_____	_____
PAY A	_____	
PAY B	_____	

***The higher number is the ESTIMATED Plan Payment. NOTE: This payment is an estimate only.**

***We will figure the exact payment from your actual bills and credit report.**

Costs to file Chapter 13:

Atty fees:		
Counseling:	\$22.00	
Debtor Ed:	\$20.00	
Credit Report:	\$33.00	\$53.00
Filing Fee:	\$310.00	

Costs to file Chapter 7:

Atty fees:		
Counseling:	\$22.00	
Debtor Ed:	\$20.00	
Credit Report:	\$33.00	\$53.00
Filing Fee:	\$335.00	

TOTAL: _____

TOTAL: _____

PLEASE MAKE ALL PAYMENTS FOR OUR FEES BY CASHIER'S CHECK OR MONEY ORDER. THANK YOU