

# BUTLER LAW OFFICE

# NEW CLIENT INTAKE FORM

Consultation Fees: The initial consultation fee is \$100 per 1/2 hour and \$200 per hour.

PLEASE PRINT

DATE: \_\_\_\_\_  
 Who referred you? \_\_\_\_\_  
 PPL? \_\_\_\_\_

NAME: \_\_\_\_\_ SSN: \_\_\_\_\_  
 LAST FIRST MIDDLE Home Phone \_\_\_\_\_  
 Cell Phone \_\_\_\_\_  
 Work Phone \_\_\_\_\_  
 Email \_\_\_\_\_

SPOUSE: \_\_\_\_\_ SSN: \_\_\_\_\_  
 LAST FIRST MIDDLE Cell Phone \_\_\_\_\_  
 Work Phone \_\_\_\_\_  
 Email \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_  
 City State Zip code

### FINANCIAL INFORMATION

1. Your Gross Monthly Income \$ \_\_\_\_\_ Occupation? \_\_\_\_\_ Name of employer \_\_\_\_\_

2. Spouse Gross Monthly Income \$ \_\_\_\_\_ Occupation? \_\_\_\_\_ Name of employer \_\_\_\_\_

Other sources of income in your household: (child support, social security, etc.) \_\_\_\_\_

Total household income for past 6 months \$ \_\_\_\_\_ Total individuals in your household \_\_\_\_\_

3. How long have you lived in Arizona? \_\_\_\_\_ If less than 2 years, where did you previously live \_\_\_\_\_

4. Do you own \_\_\_ or lease \_\_\_ your home? Market Value of home if you own \$ \_\_\_\_\_  
 If you own your home, when did you purchase it? \_\_\_\_\_ Monthly lease payment if you lease \$ \_\_\_\_\_

5. Name of First Mortgage Company \_\_\_\_\_ Balance of 1<sup>st</sup> Mortgage \$ \_\_\_\_\_  
**Monthly Mortgage payment** \$ \_\_\_\_\_ Includes taxes and insurance? \_\_\_ Y \_\_\_ N Annual Interest rate \_\_\_\_\_ %  
 Date of last payment \_\_\_\_\_ **Date of Foreclosure sale, if any** \_\_\_\_\_

Name of Second Mortgage Company (if any) \_\_\_\_\_ Balance of 2<sup>nd</sup> Mortgage \$ \_\_\_\_\_  
 Monthly payment \$ \_\_\_\_\_ Annual Interest Rate \_\_\_\_\_ % Date of last payment \_\_\_\_\_  
 Homeowner's Association name \_\_\_\_\_ Monthly Payment \$ \_\_\_\_\_ # months behind \_\_\_\_\_

6 Other real property owned:

Description (home, 4 plex, etc)	Market Value	1 <sup>st</sup> Mortgage/ Payment	2 <sup>nd</sup> Mortgage/ Payment	Foreclosure date?
_____	_____	_____/_____	_____/_____	_____
_____	_____	_____/_____	_____/_____	_____

7. **VEHICLES**

Make/Model	Year	Mileage	Date Purchased	Loan Balance	Monthly Payment	Date of Last Payment	Value?
_____/_____	_____	_____	_____	\$ _____	\$ _____	_____	_____
_____/_____	_____	_____	_____	\$ _____	\$ _____	_____	_____
_____/_____	_____	_____	_____	\$ _____	\$ _____	_____	_____
_____/_____	_____	_____	_____	\$ _____	\$ _____	_____	_____
_____/_____	_____	_____	_____	\$ _____	\$ _____	_____	_____

8. Total of credit cards, medical or other unsecured debts \$ \_\_\_\_\_

Notes: (office use only) \_\_\_\_\_

Projected HAMP Payment \_\_\_\_\_ PI payment at 2 % \_\_\_\_\_ Escrow payment \$ \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

9. Are any of your debts with a Credit Union? Yes\_\_\_\_ No\_\_\_\_ If yes, list all Credit Union debts:  
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10. Do you have any unpaid student loans? \_\_\_\_\_ Amount owed \$\_\_\_\_\_
- Do you owe any back due child support? \_\_\_\_\_ Amount in Arrears \$\_\_\_\_\_ Monthly payment \$\_\_\_\_\_
11. Do you have any unfiled tax returns? \_\_\_\_\_ What Years \_\_\_\_\_
- Do you owe any taxes to any tax authority? \_\_\_\_\_ IRS \$\_\_\_\_\_ State \$\_\_\_\_\_ Property Taxes \$\_\_\_\_\_
12. Do you have any judgments entered or lawsuits pending against you? \_\_\_\_\_ Describe: \_\_\_\_\_
- 
13. Are any of your debts co-signed? \_\_\_\_\_ By whom? \_\_\_\_\_
14. Have you ever filed Bankruptcy (7 or 13)? \_\_\_\_\_ Ch 7 date \_\_\_\_\_ Ch 13 date \_\_\_\_\_
15. Have you operated a business within the last 6 years? \_\_\_\_ Nature of business \_\_\_\_\_ Is it operating? \_\_\_\_\_
16. Are you being garnished, threatened or repossessed? \_\_\_\_\_ Describe: \_\_\_\_\_
17. Have you had cash advances against your credit cards of more than \$750 in the last 70 days, or used any credit card to purchase more than \$500 worth of good and services in the last 90 days? \_\_\_\_\_
18. Other assets of value including businesses owned, real estate, stocks or other investments
- |             |              |        |
|-------------|--------------|--------|
| Description | Market Value | Loans? |
| _____       | _____        | _____  |
| _____       | _____        | _____  |
19. Could you receive an inheritance in the next 6 months? No\_\_\_ Yes\_\_\_\_\_ (Explain) \_\_\_\_\_
20. Have you transferred anything of significant value within the last 4 years? Yes\_\_\_\_\_ No\_\_\_\_\_
- What was transferred and to whom? \_\_\_\_\_
- 
21. Do you lease any real property or any personal property (cars, etc) \_\_\_\_\_
- Details: \_\_\_\_\_
- 
22. Do you have any claims pending against someone else for personal injury or other claims? \_\_\_\_\_
- Details \_\_\_\_\_
- 

**23. I/We understand that there is an initial consultation fee of \$100 for ½ hour and \$200 for an hour.**

**24. Representation : I/we affirm that the information provided on this form (and/or to be provided in the future) is true and accurate and complete to the best of my/our knowledge.**

Signatures: \_\_\_\_\_

FOR OFFICE USE ONLY											
Estimated arrearages on home:\$	_____	First \$	_____	Second \$	_____	HOA \$	_____				
Car Loans:	\$	_____	Vehicle 1 \$	_____	Vehicle 2 \$	_____					
Other secured debt	\$	_____	Describe _____								
Tax liabilities	\$	_____	1	2	3	4	5	6	7	8	
Child Support	\$	_____	42,476	56,692	61,845	69,205	76,705	84,205	91,705	99,205	
Other	\$	_____	3,540	4,724	5,154	5,767	6,392	7,017	7,642	8,267	
Fees	\$	_____	Sec: \$1,081,400 Unsec: \$360,475								
TOTAL	\$	_____									
Estimated plan payment:			60 mos:	_____	36 months :	_____					

## Butler Law Office

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Tempe, Arizona 85282  
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Morgan Seegmiller, Esq.

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morgan@legalaz.com

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### DEBT ASSISTANCE INITIAL CONSULTATION AGREEMENT

1. The client desires to obtain advice and assistance with a loan modification and/or debt issues and relief from debt, and has scheduled an initial consultation with the Butler Law Office (Allen D. Butler, P.C.) The client understands that in order for the attorney to give meaningful advice, certain detailed financial information must be provided fully and accurately. The client agrees to give accurate, honest, full and fair disclosure of financial information as required by attorney.
2. The attorney agrees to interview the client and give advice and counsel to assist the client in making decisions about debt problems, the possibility of filing bankruptcy, or modifying a mortgage, selecting the appropriate chapter of bankruptcy, and how a bankruptcy case may help or hurt the debt problems of the client. The initial consultation will consist of a review of the client's current monthly income, completion of a monthly budget of regular expenses, preliminary analysis of qualifications for loan modification and/or certain chapters of bankruptcy, a preliminary analysis of the client's debt statements and a recommendation.
3. The initial one-half hour or one-hour consultation and interview will be performed by a licensed attorney at the following rates: \$100 for one-half hour and \$200 for one hour. Should client retain attorney within 60 days of the initial consultation, these fees will be applied to the fees for Loan Modification or Bankruptcy. All other services will be billed at the agreed upon hourly rate of \$250 per hour.
4. In the event that the client decides to file a bankruptcy or loan modification case, a new written agreement must be signed by the client and the attorney, which will supersede this agreement relating to attorney fees and expenses. This new agreement will also provide a detailed explanation of the services performed or to be performed by the Butler Law Office (Allen D. Butler, P. C.)

**Agreed, Understood and Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.**

\_\_\_\_\_  
Client

\_\_\_\_\_  
Client

\_\_\_\_\_  
ALLEN D. BUTLER, Attorney at Law