

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 1st 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 2nd 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 st Mortgage/ Payment	2 nd 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:

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

406 E. Southern Avenue
Tempe, Arizona 85282
480-921-0626
480-967-5075 (f)

Allen D. Butler, Esq.
Morgan Seegmiller, Esq.

abutler@legalaz.com
morgan@legalaz.com

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