

Pro Se Assistance Project

Intake Form

Date: _____

Name: _____

Address: _____

City, State &
Zip: _____

County of
Residence: _____

Telephone: _____

Email
Address: _____

Languages Spoken (other than English): _____ Spanish _____ Other

Family Size (# people in household): Adults: _____ Children: _____

Total Gross Monthly Income: \$ _____

Source of Income (check all that apply):

____ Employment _____ Unemployment

____ Welfare _____ VA Benefits

____ Social Security _____ Retirement

____ Other (please specify): _____

Do you have more than \$5,000 in assets? ____ yes ____ no

Do you own real property (e.g. house)? ____ yes ____ no

Are you facing foreclosure? ____ yes ____ no

I hereby certify that the information I have provided on this form is complete and accurate:

Signature

Bankruptcy Related Questions

How long have you lived in Florida? _____

If you have already filed for Bankruptcy and have an active Bankruptcy case, please complete the following:

What Chapter did you file? (e.g. 7, 11, 12, 13) _____

When did you file? _____

Did you receive help preparing the petition? _____

Petition preparers name: _____

What is your bankruptcy case number? _____

What was the latest case activity? (filing, hearing, etc.) _____

Do you owe taxes? _____

What questions do you have?

If you have not already filed for Bankruptcy, please attempt to answer the following:

Have you filed for bankruptcy in the past? If so, when and what was the result?

Do you own your home? ____ yes ____ no

Is your home currently scheduled for a foreclosure sale? ____ yes ____ no

Do you have more than one mortgage on your home? ____ yes ____ no

If married, do you and your spouse intend to file jointly? ____ yes ____ no

What is your gross income (e.g., wages, retirement, social security, and other support)? _____

Employer: _____

Occupation: _____

Length of employment: _____

Do you have dependents? (i.e. children or parents you financially support)? ____ yes ____ no

Are you expecting to receive an inheritance in the next 6 months? ____ yes ____ no

Is your pay or bank account being garnished or has it recently been garnished? ____ yes ____ no

If yes, when and by whom? _____

Have you recently been sued? yes no

If yes, when and by whom? _____

Have you made payments to your creditors in the past 90 days? yes no

Have you made any gifts or transferred any assets (e.g., cash, cars, real estate) to anyone within the past 3 years?
 yes no

Have you been in any debt consolidation/settlement programs? yes no

Have you attempted to modify your mortgages with your mortgage lender? yes no

What are your approximate monthly expenses? _____

Please list the property you own:

House Stocks Jewelry Timeshares Land

Other property: _____

Please list your cash, insurance investments and any utility deposits:

Bank account balance: _____

Cash value of life insurance policies: _____

Utility deposit amount: _____

Do you own a business? yes no

What kind? Corporation Partnership Sole Proprietorship Other

Type of business: _____

Outstanding accounts receivable? yes no

Are you owed a tax refund? yes no

Does anyone owe you money? yes no

Do you have "tools" used in your business (e.g., machinery, vehicle, etc.)? yes no

What kind of retirement plan do you have, if any? _____

How much did you put in your retirement plan(s) in the last 3 years? _____

If you are a Creditor in a bankruptcy case, please complete the following:

Who is the debtor? _____

What is the bankruptcy case number? _____

What type of case (e.g. 7, 11, 12, 13)? _____

Claim filed? yes no When? _____

What questions do you have for the attorney? _____
