

LAW OFFICES OF MARVIN WOLF

151 W. Passaic Street, 2nd Fl.
Rochelle Park, New Jersey 07662

2018 Voorhies Avenue, #A4
Brooklyn, New York 11235

Other meeting offices available by appointment throughout New Jersey and New York

Office: _____ **INITIAL INTAKE: FINANCIAL ISSUES** Date: _____

First Name: _____ Middle _____ Last Name _____

Were you ever known by any other name(s)? No Yes _____

Address: _____ Apt. _____

City: _____ County _____ State: _____ Zip: _____

Home Phone _____ Work Phone _____ Cell Phone _____

E-mail: _____ Date of Birth _____

I found you by:	Avvo <input type="checkbox"/>	My website <input type="checkbox"/>	Internet Ad <input type="checkbox"/>	Attorney <input type="checkbox"/>	Friend <input type="checkbox"/>	Union Plan <input type="checkbox"/>
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Did you **EVER** file for bankruptcy? No Yes -when? _____ Discharge granted? No Yes

I am:	Working <input type="checkbox"/>	Not Working <input type="checkbox"/>	Unemployment <input type="checkbox"/>	Social Security <input type="checkbox"/>	Pension <input type="checkbox"/>
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Employer _____ Occupation _____

How long have you worked at this job? _____ More than one job? Yes No

I am:	Single <input type="checkbox"/>	Married* <input type="checkbox"/>	Separated <input type="checkbox"/>	Divorced <input type="checkbox"/>	Domestic Partnership <input type="checkbox"/>
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(* **If Married:** Spouse's Name: _____ Spouse's Occupation: _____)

Annual **Gross** Income before taxes/deductions for **Entire Household** is: \$ _____

Who lives with you?: You ___ Adults _____ Adult Children ___ Minor Children _____ = Total _____

Did you live in **any other** state in the last 2 years? No Yes If yes, where? _____

NOT INCLUDING YOUR HOUSE OR VEHICLES, about how much do you owe on:

Credit Cards	Credit Union	Bank Loans	School Loans
Medical Bills	Taxes	Co-Sign/Guaranty	Child Support
Car Repo	Judgments	Tickets/Surcharge	Relatives
Other			

Are you: In collection? Threat to Sue? Sued? - When and by whom: _____

Judgments? **Information Subpoena?** **Frozen Bank Accounts?** **Garnishments?**

Turn over, and complete the reverse side.

LAW OFFICES OF MARVIN WOLF Name: _____

HOUSING

A.: ONLY IF YOU OWN PROPERTY - How MANY do you own?* 1 2 3 4

The Place I LIVE in is a: House Townhouse Condo Coop

of Bedrooms? _____ # of Baths? _____ Year.Purchased: _____ Purchase Price: _____

Who is on the title? _____ Was it ever transferred? No Yes

What's the BALANCE on: 1st Mtg \$ _____ 2nd Mtg \$ _____ Home Eq Loans \$ _____

Does mortgage include: Tax Insurance What is your TOTAL monthly payment? _____

Value: Client _____ Zillow _____ Eppraisal _____ BoA _____ CMA _____ Appraisal _____

How many months are you behind? _____ (* The other property is _____)

B. ONLY IF YOU RENT: Rent stabilized/controlled? No Yes Eviction pending? No Yes

If you owe rent, how much? _____

C. TIMESHARE?: No Yes - Is there a TITLE/DEED? or a CONTRACT FOR USE?

MOTOR VEHICLES:

How many do you own? 1 2 3 4 More than 4

1ST Vehicle: Is it a: Loan Lease Paid in Full

Year _____ Make _____ Model _____ Mileage _____ Condition _____

When did you buy it? _____ For how much? _____ What do you still owe? _____

How much time is left to pay? _____ How much is the monthly payment? _____

2nd Vehicle: Is it a: Loan Lease Paid in Full

Year _____ Make _____ Model _____ Mileage _____ Condition _____

When did you buy it? _____ For how much? _____ How much do you still owe? _____

How much time is left to pay? _____ How much is the monthly payment? _____

Other questions:

Are your debts mostly: Consumer or Business Do you own a business? Yes No

Is anyone else also liable for any of your debts (co-signer/co-debtor)? Yes No

Did you run a credit report recently? No Yes Are you suing someone else? No Yes

Are you behind on payments? No Yes Could you receive an inheritance? No Yes

Have you seen another attorney? No Yes

Do you have any account or IRA with Merrill Lynch Charles Schwab Wells Fargo

Do you have any loan, savings/checking account or IRA with a credit union? No Yes

In the last 10 yrs did you own/transfer any property/land anywhere in the world? No Yes

In the last year, did you sell, hide, gift or transfer **ANYTHING OF VALUE**? No Yes

Do you have an interest in a company, partnership, corporation or LLC? No Yes

INITIAL CONSULTATION AGREEMENT

1. **PARTIES AND CONSULT RULES:** The undersigned (“Consult”) wishes Marvin Wolf, Esq., a debt relief agent (“Attorney”), to provide preliminary information on legal options regarding debt issues. Attorney will provide a **FREE** initial consultation of approximately one-half hour. Consult must disclose all assets and liabilities; and provide complete and accurate financial information, Attorney will provide information about debt issues and possible solutions, including budgeting, settlements, consolidation and bankruptcy. The initial consult may be terminated at any time by either Attorney or Consult.

3. **NONREPRESENTATION.** This is only an initial consultation and Attorney’s obligations completely end at the end of the initial consultation. **After this consultation ends, Attorney is not Consult’s lawyer unless another retainer is signed and Attorney is paid.** Estimates of fees and costs for cases are only estimates and may change as and if new facts arise. Attorney may charge Consult if Consult requests other services, such as electronic database searches, printing and copying, credit reports or tax searches. Consult is responsible to pay for these at the time of performance of said services.

4. **DISCLOSURES:** Consult confirms receipt in-person, by mail, download from website or e-mail of the disclosures entitled: **IMPORTANT INFORMATION ABOUT BANKRUPTCY ASSISTANCE SERVICES AND ALTERNATIVES TO BANKRUPTCY FROM AN ATTORNEY OR BANKRUPTCY PETITION PREPARER; PURPOSES AND BENEFITS AND COSTS OF BANKRUPTCY; FULL DISCLOSURE AND ACCURACY; INSTRUCTIONS REQUIRED TO BE PROVIDED TO DEBTOR PURSUANT TO 11 U.S.C. § 527(c); FRAUD AND CONCEALMENT PROHIBITED; and DECLARATIONS FOR REAFFIRMATION REQUIRED BY § 524(k).** Attorney will discuss these issues during the consultation.

5. **PRIVILEGE:** Attorney’s notes will be considered privileged information; but, information provided to prepare the petition may not be covered by privilege. Consult understands that if someone else attends the consultation, the consultation will NOT be protected by attorney-client privilege.

6.:**PROPERTY NOT PROTECTED: ATTORNEY DOES NOT RECOMMEND CHAPTER 7 IF YOU ARE TRYING TO SAVE/KEEP REAL PROPERTY OR RENT STABILIZED APARTMENT, EVEN IF THE PROPERTY VALUE IS LESS THAN THE MORTGAGE. THE TRUSTEE CAN SELL REAL PROPERTY AND EVEN MAKE MONEY ON A SHORT SALE.**

7.:**OATH: I AM AN ATTORNEY, NOT AN ACCOMPLICE. BY SIGNING BELOW, YOU REPRESENT THAT ALL INTAKE ANSWERS ARE COMPLETE, ACCURATE, AND TRUTHFUL, ALL ASSETS AND LIABILITIES WERE DISCLOSED, AND WILL CONTINUE TO BE DISCLOSED IN THE SWORN DOCUMENTS FILED IN THE CASE. YOUR CASE INFORMATION CAN BE AUDITED BY THE U.S. TRUSTEE. FAILURE TO TRUTHFULLY LIST ALL INFORMATION MAY RESULT IN CASE DISMISSAL OR OTHER SANCTIONS, INCLUDING CRIMINAL AND CIVIL PENALTIES. THE FBI INVESTIGATES BANKRUPTCY CRIMES.**

Consult _____ Date: _____

Consult _____ Date: _____

