

CLIENT SIGN-IN SHEET (Company)

Date:

1. Name of Business(s): _____
2. Address(mailing and physical) Physical: _____
Mailing (only if different from physical): _____
3. Phone numbers and availability: Home _____ Cell: _____
Work: _____
4. E-mail address: _____
5. May we use this email to send forms, worksheets, etc.? _____
6. Total of secured debt : _____
7. Total of unsecured debt _____
8. Has the company filed all of its federal and state income and payroll taxes? If not, when were they last filed?
Do you owe any taxes? If so, to whom, for what years and in what amounts? _____

9. Are you involved in any lawsuits? If so, where is the suit pending? What is it about? Do you have a lawyer? Please provide me a copy of the lawsuit, any exhibits and any response to it: _____

10. Phone numbers and availability: Home _____ Cell: _____
Work: _____
11. Does your company own or lease property? If so, please provide details: _____

| Type of Property | None | Description & Location of Property | Current Value of Debtor's Interest in Property w/o deducting secured claim or exemption |
|------------------|------|------------------------------------|---|
| Cash on hand | | | |

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|--|--|--|--|
| Checking, Savings or other financial accounts, certificates of deposit, or shares in banks, savings and loan, thrift, building and loan, and homestead associations, or credit unions, brokerages houses or cooperatives | | | |
| Security Deposits w/public utilities, telephone co., landlords, etc. | | | |
| Interests in insurance policies. Name of insurance company of each policy and itemize surrender or refund value of each | | | |
| Stock and interests in incorporated and unincorporated businesses. Itemize. | | | |
| Interests in partnerships or joint ventures. Itemize | | | |
| Government and corporate bonds and other negotiable and nonnegotiable instruments. | | | |
| Accounts receivable. | | | |
| Other liquidated debts owed to debtor including tax refunds. Give particulars. | | | |
| Other contingents and unliquidated claims of every nature including tax refunds, counterclaims, of the debtor, and rights to setoff claims. Give estimated value of each. | | | |
| Patents, copyrights, and other intellectual property. Give particulars. | | | |
| Licenses, franchises, and other general intangibles. Give particulars. | | | |

| | | | |
|--|--|--|--|
| Customer lists or other compilations containing personally identifiable information provided to the debtor by individuals in connection with obtaining a product or services from the debtor primarily for personal, family, or household purpose. | | | |
| Automobiles, trucks, trailers, and other vehicles and accessories. | | | |
| Boats, motors and accessories. | | | |
| Aircraft and accessories | | | |
| Office equipment, furnishings and supplies. | | | |
| Machinery, fixtures, equipment and supplies used in business | | | |
| Inventory | | | |
| Other personal property of any kind not already listed. Itemize. | | | |
| | | | |

12. How did you find out about us (who referred you to us)? _____

13. Am I the first attorney you have consulted in this matter? ____yes ____no

If not, who else have you consulted? _____

14. What is the relative urgency?

- Critical–Personal safety or continuation of business depends on it.
- Very important– Severe hardship, personal or financial inconvenience to client if matter is not resolved quickly.
- Important– Matter interferes with business or personal stability.
- Needs to be done, but not immediate hardship in the interim
- Thought I'd see if it was worth pursuing, but I'm not really counting on anything.

15. If the matter involves payment to you of money you feel you are owed, how long can you wait before failure to receive these funds will prove a hardship?

16. How will you pay for your attorney's fees in this matter?

For Attorney's use only:

Will Represent

Will not represent

Will not retain us at this time, but will contact us in future

Attorney's Fees: \$_____

Filing Fees: \$_____

Cost Retainer: \$_____