

**Davis Nardone, PC  
235 Cabarrus Avenue, East  
Concord, NC 28025**

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**ABOUT THE FACT SHEETS**

Thank you for inquiring about bankruptcy with our office. We hope to make your experience in these hard times as pleasant as possible. We wanted to include some instructions on filling out the Client Interview Worksheets. The purpose of these forms is to help the attorney fully understand your financial situation so that she may advise you accordingly. It is very important to have this interview sheet filled out completely.

On the back page you have to list the past 6 month's gross income (before any deductions). There are 6 blank spaces to write the name of the month as well. Please do not leave any of this blank. If there is a month when you did not receive any income, please mark it with a zero 0. If you are married and want to file individually, we will still need your spouse's information on these forms.

If at any time you have questions, please feel free to call me at **704-784-9440** or email me at [jessica@davisnardone.com](mailto:jessica@davisnardone.com).

Sincerely,

Jessica Streater  
Certified Legal Assistant

### Client Information Worksheets

Debtor

Spouse

Full Name: \_\_\_\_\_

Filed before? Yes \_\_\_\_\_ No \_\_\_\_\_ When: \_\_\_\_\_ Where: \_\_\_\_\_

Number of Dependants Living with You \_\_\_\_\_ Household size \_\_\_\_\_

Employer: \_\_\_\_\_

How long have you lived in NC? \_\_\_\_\_ Phone #: \_\_\_\_\_

Address: \_\_\_\_\_

What goal do you want to accomplish in bankruptcy?

- |  |   |
|--|---|
| a) Save a house _____                        | d) Get rid of overwhelming unsecured debt _____ |
| b) Save a car _____                          | e) Other _____                                  |
| c) Start over after releasing property _____ |   |

#### FAMILY INCOME

	DEBTOR	SPOUSE
Gross wages, salary, commissions		
Estimated monthly overtime		
Subtotal of income		
Payroll Deductions:		
Payroll taxes & social security		
Insurance		
Union Dues		
Other (SPECIFY)		
Subtotal of Deductions		
Other income:		
Regular income from business, farm or profession		
Income from real estate property		
Interest & dividends		
Alimony or support payments payable to debtor or dependents		
Social security or other government benefits (SPECIFY)		
Pension and/or retirement		
Other income (SPECIFY)		
Subtotal of other income		
<b>TOTAL MONTHLY INCOME</b>		

### MONTHLY EXPENSES FOR FAMILY

Rent or mortgage payment (Include lot rent for mobile home)	
Property taxes included in payment <input type="checkbox"/> Yes <input type="checkbox"/> No	
Property Insurance included in payment <input type="checkbox"/> Yes <input type="checkbox"/> No	
Electric/Heating Fuel	
Water & Sewer	
Total Telephone Expense	
Cable	
Internet Service	
Home Maintenance	
Child Care	
Food (include lunches)	
Clothing	
Laundry & Dry Cleaning	
Medical & Dental	
Transportation (not car payment)	
Recreation (newspaper, magazines, entertainment, club, etc.)	
Charitable Contribution	
Insurance (not deducted from wages or included in mortgage)	
Homeowners or Renters Insurance	
Life Insurance	
Health Insurance	
Auto Insurance	
Other ( <b>SPECIFY</b> )	
Taxes (not deducted from wages or included in mortgage) ( <b>SPECIFY</b> )	
Alimony, support paid to others ( <b>SPECIFY</b> )	
Other ( <b>SPECIFY</b> )	
Total Monthly Expenses	

**HOMES:**

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	Whose name is it in?	Pay Off Amount	Behind ?	Monthly Payment
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House 1

2<sup>nd</sup> Mortgage

House 2

2<sup>nd</sup> Mortgage

Additional  
Properties

Description Of Vehicle	Title to?	Value	Payoff Amount		Monthly Payment	Date of purchase
				\$		
				\$		
				\$		
				\$		

Notes:

Credit Cards, Signature Loans, Cash Reserve and Repossessions.

CARD NAME/Personal Loans

AMOUNT OWED

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TOTAL

**TAXES**

State/Federal/County

Year

Amount

**LAST SIX MONTHS OF GROSS INCOME  
(GROSS =BEFORE TAXES & DEDUCTIONS ARE TAKEN OUT)**

Husband  
Month

Gross  
(Before Taxes)

Wife  
Month

Gross  
(Before Taxes)

Most recent month			
6 months ago			

**IF YOU DO NOT FILL OUT THIS PAGE COMPLETELY, WE  
WILL NOT CONDUCT A CONSULTATION, AND WE WILL  
RE-SCHEDULE YOU!!**

**\*\*Please make sure that you put the month and gross amount (before taxes are taken out) on the lines above. Please bring a print out or pay stubs for the last six months income from employer for verification purposes only.\*\***

**\*\*IF YOU PAY CHILD SUPPORT\*\***

Yes/No Amount \_\_\_\_\_ Are you behind? \_\_\_\_\_

How do you pay? \_\_\_\_\_

Who do you pay?

**NOTES:**