

Client Information Packet

Date			
(Please Print Clearly)			
Name		SSN	DOB
Address		City, State, Zip	
Home Phone	Cell Phone _	Email	
Place of Employment		How Long	Hours:
Job Description		Work Phone	Ext
() single () married	() separated	() divorced () widow(er)	() student
Spouse/Parent's Name		SSN	DOB
Home Phone	Cell Phone _	Email	
Place of Employment		How Long	Hours:
Job Description		Work Phone	Ext



Income

Monthly Net		Source		Next Pay Date
1 How often Paid?	Weekly _	Bi-Weekly	Semi-Monthly	Monthly
Monthly Net		Source		Next Pay Date
2 How often Paid?	Weekly _	Bi-Weekly _	Semi-Monthly	Monthly
Monthly Net		Source		Next Pay Date
3 How often Paid?	Weekly	Bi-Weekly	Semi-Monthly	Monthly
Monthly I	Living Expenses		Periodic Expe	nses
Estimate amounts spent	t on these items each <u>N</u>	<u>10NTH</u> Estima	Periodic Expe	
Estimate amounts spent	t on these items each M	<u> 10NTH</u> Estima	te amounts spent on the	se items each <u>YEAR</u>
Estimate amounts spent \$ \$	t on these items each \(\frac{1}{2} \) Charities Food	<u>AONTH</u> Estima	ste amounts spent on the \$ Clothin \$ Gifts	se items each <u>YEAR</u>
Estimate amounts spent \$ \$ \$	t on these items each \(\frac{1}{2} \) Charities Food Lunches	<u> 10NTH</u> Estima	\$Clothin \$Gifts \$Home	ese items each <u>YEAR</u> ng Repairs
Estimate amounts spent \$ \$ \$ \$ \$	t on these items each M Charities Food Lunches Vehicle Gas	<u>AONTH</u> Estima	\$ Clothin \$ Gifts \$ Home \$ Vehicle	ng Repairs e Repairs
S	t on these items each M Charities Food Lunches Vehicle Gas Laundry	MONTH Estima	\$ Clothin \$ Gifts \$ Vehicle \$ Medica	rse items each YEAR ng Repairs e Repairs
S	ton these items each Market on these items each Market on these of the control of	<u>AONTH</u> Estima	\$Clothin \$Clothin \$Clifts \$Vehicle \$Medica \$Christn	ng Repairs e Repairs al
S	con these items each Market on these items each Market on these of the Charities Food Lunches Vehicle Gas Laundry Recreation Tobacco/Alcohol	<u>AONTH</u> Estima	\$Clothin \$Clothin \$Clifts \$Vehicle \$Vehicle \$Medica \$Christr \$School	Repairs e Repairs al mas clothes
S	con these items each Market on these items each Market on these Charities Food Lunches Vehicle Gas Laundry Recreation Tobacco/Alcohol Pet Expense	<u>AONTH</u> Estima	\$Clothin \$Clothin \$Clifts \$Vehicle \$Medica \$Christn	Repairs e Repairs al mas clothes
S	con these items each Marches Charities Food Lunches Vehicle Gas Laundry Recreation Tobacco/Alcohol Pet Expense Miscellaneous	MONTH Estima	\$Clothin \$Clothin \$Clifts \$Vehicle \$Vehicle \$Medica \$Christr \$School	Repairs e Repairs al mas clothes



Monthly Routine Expenses

Rent				
Monthly Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Electricity				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Gas				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Water				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Cable TV				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Internet				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Cell Phone				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Child Care				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	
Child Support				
Amount	Next Due Date	Who Owed	Account Past Due?	Amount Past Due?
			Yes No	



Periodic Expenses

Vehicle Ins	urance				
Amount	Next Due Date		Who Owed		Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
Health Insu	ırance				
Amount	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
Life Insura	nce				
Amount	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
Real Estate	Taxes				
	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
House Insu	ran <i>co</i>				
	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
Vehicle Tag	e e				
Amount	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
				Yes No	
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
0.1					
Other Amount	Next Due Date		Who Owed	Account Past Due?	Amount Past Due?
Amount	Next Due Date		who Owed	Yes No	Amount I ast Duc!
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly
Other					
Amount	Next Due Date		Who Owed	Account Past Due? Yes No	Amount Past Due?
	How Often Due?	Monthly	Quarterly	Every 6 Months	Yearly



Debt Information

These 2 pages are for all of your debts which include items such as car payments, bank loans, medical bills, etc.

Regular Payment Amt.	Balance	Next Due Date	Who Owed	Account Past Due?	Total Amount Due?
				YesNo	
				YesNo	-
				YesNo	
				YesNo	-
				YesNo	
				X/	-
				YesNo	



Debt Information

These 2 pages are for all of your debts which include items such as car payments, bank loans, medical bills, etc.

Regular Payment Amt.	Balance	Next Due Date	Who Owed	Account Past Due	Total Amount Due?
			YesNo		
				YesNo	
				Yes No	
				Yes No	
				X7	
				X7	
					
				Vog No	
				YesNo	