



Members, Florida Bar:

Kathryn A. Hathaway, Esq.
 Board Certified in Consumer Bankruptcy
 by the American Board of Certification

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 Criminal Law – Foreclosure Defense

INITIAL CONSULTATION QUESTIONNAIRE

YOUR APPOINTMENT IS ON _____, 20__ AT _____ a.m. / p.m.

<p><u>PLEASE BRING WITH YOU:</u></p> <p>1. Two most recent paystubs for self and spouse 2. Two most recent tax returns filed 3. Any pleadings/summons on pending lawsuits 4. \$50 consultation fee OR \$250 as the initial retainer fee</p>	<p style="text-align: right;">OFFICE USE ONLY</p> <p style="text-align: right;">_____ Consultation Fee _____ Retained _____ Sign up for MyCaseInfo.com _____ Sign up for StartFreshToday.com _____ Credit Report Ordered?</p>
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Name _____ SS# _____ Date of Birth: _____

Home Phone _____ Cell Phone _____ Email Address _____

Address _____ City _____ State _____ Zip _____ How Long? _____

What state did you move here from? _____ When? _____ How long did you live there? _____

Employer _____ How Long? _____ Work Phone _____

I give Hathaway Sprague Law, P.A. authority to communicate with me by EMAIL **Sign Here**

Spouse's Name _____ SS# _____ Date of Birth: _____

Home Phone _____ Cell Phone _____ Email Address _____

Spouse's Employer _____ How Long? _____ Work Phone _____

Children at home? Yes / No How many? _____ Ages _____

How many people live in your household? _____ Is there additional contribution to the household? \$ _____

What result are you looking for from this consultation? _____

If you would like our firm to communicate with someone regarding your case, please state who that person is and sign giving that authority: **NAME:** _____ **YOUR SIGNATURE:** _____

Have you seen our website at www.hathawaylaw.net? Yes / No

How did you hear of **KATHRYN A. HATHAWAY**?

Sprint Yellow pages?	Talking Phone Book Yellow Pages?	Bell South Yellow Pages?	Referral from a person? Name:
Internet search:	Lawyers.com	Findlaw.com	Other:

VEHICLES

CAR 1 Year _____ Make _____ Model _____ Value \$ _____

How titled? H / W / J with _____ Who has the title? _____

MILEAGE _____ Purchased Month _____ Year _____

This vehicle is: Paid for / Lease / Being Purchased / Repossessed / Other (Circle One)

Payments made to: _____ Balance Due: \$ _____ Monthly payment \$ _____

Are you current? YES / NO If not, how many payments are past due? _____ Past due amount: \$ _____

Insured with _____

CAR 2 Year _____ Make _____ Model _____ Value \$ _____

How titled? H / W / J with _____ Who has the title? _____

MILEAGE _____ Purchased Month _____ Year _____

This vehicle is: Paid for / Lease / Being Purchased / Repossessed / Other (Circle One)

Payments made to: _____ Balance Due: \$ _____ Monthly payment \$ _____

Are you current? YES / NO If not, how many payments are past due? _____ Past due amount: \$ _____

Insured with _____

CAR 3 Year _____ Make _____ Model _____ Value \$ _____

How titled? H / W / J with _____ Who has the title? _____

MILEAGE _____ Purchased Month _____ Year _____

This vehicle is: Paid for / Lease / Being Purchased / Repossessed / Other (Circle One)

Are you current? YES / NO If not, how many payments are past due? _____ Past due amount: \$ _____

Insured with _____

ASSETS

Value	Value	Value
Furniture \$ _____	Inventory \$ _____	Computer \$ _____
Appliances \$ _____	Boats \$ _____	Collections \$ _____
Jewelry \$ _____	Trailers \$ _____	Art Work \$ _____
Stocks/Bonds \$ _____	Tools \$ _____	Antiques \$ _____

Describe any other property you own with a value greater than \$1000.00:

CREDITORS

	Monthly Payment	Balance	Number of Months Behind	Secured? Unsecured? Credit Card?
MORTGAGES				
1.				
2.				
3.				
Cars/Boats/Motorcycles				
1.				
2.				
3.				
Credit Cards				
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
Medical Bills				
1.				
2.				
3.				
Finance Companies				
1.				
2.				
3.				
4.				
Federal or State Taxes				
1.				
2.				
3.				

BUDGET

MONTHLY EXPENSES

INCOME: wkly/bi-wkly/semi-mo./monthly	Debtor	Spouse	Total
Net Take Home Pay	\$ _____	\$ _____	\$ _____
Net pay from self employment	\$ _____	\$ _____	\$ _____
Child Support/Alimony	\$ _____	\$ _____	\$ _____
Social Security Income	\$ _____	\$ _____	\$ _____
Income from Pension	\$ _____	\$ _____	\$ _____

Expenses:

Rent/Mortgage	\$ _____
Second Mortgage	\$ _____
Utilities	\$ _____
Sewer/Water	\$ _____
House Phone	\$ _____
Cell phone	\$ _____
Cable	\$ _____
Home Maintenance	\$ _____
Food	\$ _____
Clothing	\$ _____
Laundry/Dry Cleaning	\$ _____
Medical/Dental expenses (uninsured)	\$ _____
Transportation (gas, repairs & oil changes)	\$ _____
Recreation, clubs, entertainment, newspapers, etc.	\$ _____
Charity	\$ _____
Insurance	\$ _____
House:	\$ _____
Life:	\$ _____
Health (not deducted from wages):	\$ _____
Auto:	\$ _____
Other:	\$ _____
Taxes (not deducted from wages or included in house payment):	\$ _____
Installment payments	
Auto:	\$ _____
Furniture:	\$ _____
Day Care:	\$ _____
Other:	\$ _____
Student loans	\$ _____
Alimony, maintenance & support paid to others:	\$ _____
Pmt's for support of add. dependents not living at your home:	\$ _____
Regular expenses from operation of business, profession or farm:	\$ _____
Misc. emergency exp., pet exp., haircuts, household supplies etc.	\$ _____

PROPERTY AND LAND

1. Do you own an interest in real property (LAND) anywhere? YES / NO If yes, please list all.

Property 1:

House/Mobile Home/ Condo/ Other (Circle One)

Location? _____ Value? _____ Homestead/Other

Whose name is on the Deed? _____ If owned jointly, relationship to joint owner? _____

Mortgage Balance owed? _____ Monthly payments _____

Whose name is on the Mortgage and Note? _____

Are you in arrears in paying the mortgage? YES / NO

Have you been served with court papers regarding this debt? YES / NO

If you answered yes to either of the above two questions, please fill out Addendum A.

Property 2:

House/Mobile Home/ Condo/ Other (Circle One)

Location? _____ Value? _____ Homestead/Other

Whose name is on the Deed? _____ If owned jointly, relationship to joint owner? _____

Mortgage Balance owed? _____ Monthly payments _____

Whose name is on the Mortgage and Note? _____

Are you in arrears in paying the mortgage? YES / NO

Have you been served with court papers regarding this debt? YES / NO

If you answered yes to either of the above two questions, please fill out Addendum A.

Property 3:

House/Mobile Home/ Condo/ Other (Circle One)

Location? _____ Value? _____ Homestead/Other

Whose name is on the Deed? _____ If owned jointly, relationship to joint owner? _____

Mortgage Balance owed? _____ Monthly payments _____

Whose name is on the Mortgage and Note? _____

Are you in arrears in paying the mortgage? YES / NO

Have you been served with court papers regarding this debt? YES / NO

If you answered yes to either of the above two questions, please fill out Addendum A.

Addendum A.

Information regarding property in default (if more than one, please copy page and complete for each).

Address of Property _____

Names of all Co-owners w/ Address (if different) _____

Year Purchased _____

Original Purchase Price _____

Estimate of Current Value _____

Owner Occupant?

At purchase? Yes _____ No _____

Now? Yes _____ No _____

Multi-Family Home? Yes _____ No _____

Name of tenants _____

Rent received _____

Condition: Exc ____ Good ____ Fair ____ Poor ____

Major repairs needed? YES / NO

Describe: _____

Number of Mortgages: _____

Other Liens: _____

MORTGAGE

Type of Mortgage

Purchase Money _____

Refinance _____

Home Equity Loan _____

Debt Consolidation _____

Other _____

Year of Mortgage _____

Original Amount _____

Current Lender and/or Servicer _____

Loan Account Number _____

Address _____

Phone: _____

Fax: _____

Contact Person _____

Prior Lenders or Servicers: _____

Investor/Insurer (check one)

- FHA Insured _____
- VA _____
- RHS _____
- Fannie Mae _____
- Freddie Mac _____
- PMI _____
- Other _____

Term of mortgage (in months) _____

Interest Rate _____

Principal and Interest Payment (monthly) _____

Tax and Insurance Payment (monthly) _____

Total Monthly Payment _____

Months Behind _____

Total Arrears Including Costs _____

Current Principal Balance _____

Payoff Amount _____

Reason for Default: _____

OTHER

1. Have you made an effort to arrange a workout on your own? If so, what was the result?

2. Are you interested in applying for a mortgage modification? YES / NO