**LAW OFFICE OF WILLIAM WALDNER**

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Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Have you ever filed for bankruptcy before?:\_\_\_\_\_\_\_\_\_\_\_When?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Where do you live?:\_\_\_\_\_\_\_\_For how long?:\_\_\_\_\_\_What borough of NYC?\_\_\_\_\_\_\_\_\_
3. Are you single, married or divorced?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Do you have any children?:\_\_\_\_\_\_\_\_\_\_\_What ages?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Are you suing anyone or thinking of suing anyone or suing anyone?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. Do you have any life insurance policies?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. When is the last time you used a credit card?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
8. Have you purchased any luxury goods or services in the last 90 days on a **credit card**?(this does not include goods or services necessary for the support or maintenance of yourself or your dependent(s))\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
9. When is the last time you took a cash advance out on a credit card or received a cash/payday loan?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
10. Is anyone holding any valuables, cash or assets for you?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
11. What is the most money you have had in any bank account in the last 2 years?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
12. Do you have any retirement accounts?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    1. If so, are they funded through your paycheck at work?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
13. Have you ever owned any Real Property?(co-op, timeshare, house):\_\_\_\_\_\_\_\_\_\_\_
14. How Much is your rent/mortgage payment?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_
15. Do you live in a rent stabilized/controlled apartment?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
16. Do you own, lease or finance a car?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Monthly Payment:\_\_\_\_\_\_\_\_\_\_\_
17. Are you expecting a tax refund?:\_\_\_\_\_\_\_\_\_\_\_\_\_ How much?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
18. Have you received or expecting an inheritance? :\_\_\_\_\_\_\_\_When?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
19. What other assets do you own?( boat, jewelry, stocks, guitar….):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
20. Does anyone owe you money?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
21. Have you given anything away of value in the last 6 years?(including gifts or sales/transfers of property to friends or family)? (car, cash, stock, house):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
22. Where do you work?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ For how long?\_\_\_\_\_\_\_\_\_\_\_
    1. List your **GROSS** income per **MONTH?:\_\_\_\_\_\_\_\_\_; Per paycheck?:\_\_\_\_\_\_\_**
    2. List your **YEARLY GROSS** income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    3. How much are your yearly bonuses?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    4. Does anyone else support you?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    5. Do you support anyone else?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
23. If you are married, where does your spouse work?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    1. What is his/her **GROSS** income per month?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
24. Have you ever owned a business (even part ownership)?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
25. Do you owe any back taxes?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
26. Do you owe any student loans?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
27. How much credit card debt do you have?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
28. What other debts do you have?:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_