

**BRET NASON**  
*ATTORNEY AT LAW*

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**Intake Form**

Date of consultation: \_\_\_\_\_

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

Spouse's Full Name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Email address: \_\_\_\_\_ Phone number: \_\_\_\_\_

How did you hear about me? If you were referred by a person, who referred you to me?

Where are your checking and/or savings accounts?

**Approximately** how much do you owe on:

- First mortgage? \_\_\_\_\_
- Second mortgage or home equity loan? \_\_\_\_\_
- First vehicle loan? \_\_\_\_\_
- Second vehicle loan? \_\_\_\_\_
- Student loans? \_\_\_\_\_
- Credit cards? \_\_\_\_\_
- Medical bills? \_\_\_\_\_
- Payday loans, judgments, or other creditors? \_\_\_\_\_

Please list all the vehicles you own (even if you're making payments on them) along with their approximate values.

**Approximately** how much money did your household earn last year? Count everything: unemployment, disability, employment, Social Security, child support, etc. \_\_\_\_\_

Counting yourself, how many people live in your home? \_\_\_\_\_

YES NO

\_\_\_\_ Are you employed? If so, where? \_\_\_\_\_

\_\_\_\_ Is your spouse employed? If so, where? \_\_\_\_\_

\_\_\_\_ Have you lived in Wisconsin all of the last 3 years?

\_\_\_\_ Have you co-signed any loans for anyone else, that still has a balance owed?

\_\_\_\_ Has anyone co-signed any loans for you, that still has a balance owed?

\_\_\_\_ Even if you never expect to collect, does anyone owe you money for any reason? For example, do you have a right to sue anyone for anything, or do you have personal injury claim that you could file or that you have filed?

\_\_\_\_ Have you used credit cards for anything **other than** gas, groceries, clothes, or other typical household necessities in the past 3 months?

\_\_\_\_ Have you disposed of anything in the past four years? This would include trading something, selling something, giving something away, removing your name from the title of an asset, etc. If you had it four years ago, and no longer have it, what happened to it?

\_\_\_\_ In the past year, have you made any payments on personal loans to family members?

\_\_\_\_ Do you own any real estate? (**This includes your home, even if the bank has a mortgage.**) If yes, how much is it worth? \_\_\_\_\_

\_\_\_\_ Do you owe taxes to the IRS or any state taxing authority? If so, how much? \_\_\_\_\_

\_\_\_\_ Do you pay alimony, child support, or maintenance? If so, are you current? Yes No

\_\_\_\_ Have you ever been divorced? If so, when? \_\_\_\_\_

\_\_\_\_ Have you ever filed bankruptcy before? If so, when? \_\_\_\_\_

\_\_\_\_ In the last 4 years, have you owned any part of an LLC, partnership, sole proprietorship or any other business entity?