

INITIAL CHECKLIST

Date: _____ Attorney: _____; Paralegal: _____

Name: _____

Spouse: _____

Prior cases? [] No; [] Yes [print PACER]

Reason for Visit/Pending Actions: _____

How long lived in Georgia? _____

Household size: _____ Estimated gross household income: _____ per _____

Source(s) of Income: _____

Major assets – Real Estate _____

Vehicles _____

Other _____

Any claims or potential claims against 3rd parties? [] No; [] Yes. Describe - _____

Transactions:

a) New debt - _____

b) Transfers - _____

c) Preferences - _____

Estimated total, general unsecured debt: _____

Student loans? [] No; [] Yes. Estimated total \$ _____

Status: [] Paying \$ _____ per _____; [] Deferred to ____/____; [] In default

Income taxes? [] No; [] Yes HOA/Condo Ass'n? [] No; [] Yes

Pay child support? [] No; [] Yes – Arrears? : _____ Ongoing Amount?: _____

SECURED AND PRIORITY DEBT

Creditor:	Type of Debt:	Collateral:	Date Incurred:	Balance:
Cosigned? Yes [], No [] Joint? Yes [], No []	Retain [] Surrender [] 3 rd party pay [] Pay Direct []	FMV:	Monthly Payment:	Arrearage:

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