

CLIENT INTAKE INFORMATION FORM

Please answer all relevant questions and provide thorough and accurate information. **Prior to your consultation (at least 24 hours before)**, please deliver to our office or send by email, fax or ground mail copies of: loan documents (including, Promissory Notes, Deeds of Trust and or Mortgages); any and all correspondence from the lender or lender’s representative; any documentation you receive related to foreclosure (including but not limited to: Complaint, Notice of Trustee Sale and any cancellation or postponement information). **If you do not provide this information within a reasonable time prior to your consultation, the Attorney may not be able to properly advise you on these documents. This documentation must be submitted, along with the Consultation Agreement and Payment prior to your consultation.**

I. CLIENT CONTACT INFORMATION

- 1. Name: _____ Spouses Name: _____
- 2. Address: _____
- 3. Home Phone: _____ Cell Phone: _____
- 4. Email: _____

II. PROPERTY INFORMATION (The following questions apply to the property that will be the subject of your consultation)

- 1. Is this a commercial or residential property? _____
 - * If this is a commercial property, skip questions 2-5, and proceed to question 6.*
 - 2. If this is a residential property is this your primary residence? _____
 - 3. Is this property located on less than 2.5 acres of land? _____
 - 4. Does the property contain more than two residences? _____
 - 4. Is this property your primary residence? _____
 - 5. If this property is not your primary residence, please describe the nature and occupancy of the property _____
 - 6. What is the address of the property? _____
- _____

III. LOAN INFORMATION

A. First Lien

1. Is the First Lien on your property a Mortgage of Deed of Trust? _____
2. Who is the Lien Holder? _____
3. Original Loan Amount? _____
4. Current balance owned? _____
5. Is this loan in default, if so how long? _____
6. Have you been served with a lawsuit? _____ If yes, when is the is Answer to the Complaint due? _____ If yes, please provide a copy of the lawsuit to the firm prior to your consultation.
7. Have your received Notice of a Trustee Sale? _____ If yes, when is the Trustee Sale scheduled to occur? _____ If yes, please provide a copy of the Notice of Trustee Sale prior to your consultation.
8. Have you been notified how much is needed to bring the loan current? If so, how much is needed and how were you notified? _____

B. Second Lien

1. Is there a Second Lien on your property, and if so, is it a Mortgage of Deed of Trust?

2. Who is the Lien Holder? _____
3. Original Loan Amount? _____
4. Current balance owned? _____
5. Is this loan in default, if so how long? _____
6. Have you been served with a lawsuit? _____ If yes, when is the is Answer to the Complaint due? _____ If yes, please provide a copy of the lawsuit to the firm prior to your consultation.
7. Have your received Notice of a Trustee Sale? _____ If yes, when is the Trustee Sale scheduled to occur? _____ If yes, please provide a copy of the Notice of Trustee Sale prior to your consultation.
8. Have you been notified how much is needed to bring the loan current? If so, how much is needed and how were you notified? _____

C. Any other Liens

1. Are there any other liens on this property? If so, please provide details below. If you need additional space, please submit a separate sheet of paper. _____

IV. SPECIFIC QUESTIONS:

1. Are there any specific questions or issues, related to the subject matter of this consultation, that you would like to make sure are addressed during the consultation? If so, please provide below:

Please provide any other relevant information, or information not able to fit within the space provided above, on a separate sheet of paper.