

CAMPBELL LAW FIRM, P.A.  
CLIENT INFORMATION SHEET

Please provide us with the following information to help us serve you better (please print).

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

Social Security Number: \_\_\_\_\_ DOB: \_\_\_\_\_

Address: \_\_\_\_\_

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

Mailing Address (If different from above):

\_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Work Fax: \_\_\_\_\_

Children's Names and Ages: \_\_\_\_\_

\_\_\_\_\_

How did you choose our firm?

Referral (if yes, who may we thank for your referral?) \_\_\_\_\_

Television  Internet  Yellow Pages  Other

THANK YOU!

# BUSINESS FINANCIAL WORKSHEETS

## Types of Debt

**Secured Creditors** are creditors that have a lien on your real or personal property. Examples:

- Real Estate Mortgage
- Vehicle Loan
- Equipment
- Mechanics Liens

**Unsecured Creditors** are creditors that do not have a lien on any of your property. Examples:

- Credit Cards
- Personal Guarantees / Signature Loans
- Vendors

**Priority Creditors** are a special type of unsecured debt. Examples:

- Federal Taxes
- State Taxes
- Employee Benefits

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## Liabilities (debts you owe)

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Type of debt:  Secured  Unsecured  Priority / If secured list collateral \_\_\_\_\_ Value \$ \_\_\_\_\_

Creditor Name: \_\_\_\_\_

Amount Owed: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Amount Disputed \$ \_\_\_\_\_ # Payments Behind: \_\_\_\_\_

Is the debt personally guaranteed? \_\_\_\_\_

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Type of debt:  Secured  Unsecured  Priority / If secured list collateral \_\_\_\_\_ Value \$ \_\_\_\_\_

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Amount Disputed \$ \_\_\_\_\_ # Payments Behind: \_\_\_\_\_

Is the debt personally guaranteed? \_\_\_\_\_

## LIABILITIES (debts you owe)

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Type of debt:  Secured  Unsecured  Priority / If secured list collateral \_\_\_\_\_ Value \$ \_\_\_\_\_

Creditor Name: \_\_\_\_\_

Amount Owed: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Amount Disputed \$ \_\_\_\_\_ # Payments Behind: \_\_\_\_\_

Is the debt personally guaranteed? \_\_\_\_\_

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# Business Income and Expenses

## GROSS BUSINESS INCOME FOR PREVIOUS 12 MONTHS:

1. Gross income for prior 12 months: \$ \_\_\_\_\_

## ESTIMATED AVERAGE MONTHLY INCOME:

2. Gross Monthly Income: \$ \_\_\_\_\_

## ESTIMATED MONTHLY EXPENSES:

3. Net Employee Payroll (Do NOT include your paycheck): \_\_\_\_\_ \$ \_\_\_\_\_

4. Owner / Officer Net Payroll: \_\_\_\_\_ \$ \_\_\_\_\_

5. Payroll Taxes: \_\_\_\_\_ \$ \_\_\_\_\_

6. Unemployment Taxes: \_\_\_\_\_ \$ \_\_\_\_\_

7. Worker's Compensation: \_\_\_\_\_ \$ \_\_\_\_\_

8. Other Taxes: \_\_\_\_\_ \$ \_\_\_\_\_

9. Inventory Purchases (including raw materials): \_\_\_\_\_ \$ \_\_\_\_\_

10. Purchase of Feed/Fertilizer/Seed/ Spray: \_\_\_\_\_ \$ \_\_\_\_\_

11. Rent (Do NOT include your personal residence): \_\_\_\_\_ \$ \_\_\_\_\_

12. Utilities: \_\_\_\_\_ \$ \_\_\_\_\_

13. Office Expense and Supplies: \_\_\_\_\_ \$ \_\_\_\_\_

14. Repairs and Maintenance: \_\_\_\_\_ \$ \_\_\_\_\_

15. Vehicle Expenses: \_\_\_\_\_ \$ \_\_\_\_\_

16. Travel and Entertainment: \_\_\_\_\_ \$ \_\_\_\_\_

17. Equipment Rental and Leases: \_\_\_\_\_ \$ \_\_\_\_\_

18. Legal/Accounting/Other Professional Fees: \_\_\_\_\_ \$ \_\_\_\_\_

19. Insurance: \_\_\_\_\_ \$ \_\_\_\_\_

20. Employee Benefits (i.e., pension, medical, etc.): \_\_\_\_\_ \$ \_\_\_\_\_

21. Payments to Secured Creditors for Pre-Petition Business Debts:  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

22. Other:  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

23. Total Monthly Expenses (add items 3-22): \_\_\_\_\_ \$ \_\_\_\_\_

## ESTIMATED AVERAGE NET MONTHLY INCOME:

24. Average Net Monthly Income (subtract item 23 from item 2): \$ \_\_\_\_\_

## NOTES:

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