

HEARNS LAW GROUP, LLC

CLIENT INTAKE FORM

1401 Mercantile Lane, Suite 104
Upper Marlboro, MD 20774
301-772-0248 Phone
844-823-9397 Fax

Date

CLIENT INFORMATION

Name

Address

City, State, Zip

Cell phone

Home phone

E-mail

Social Security Number

Employer

Occupation

Work phone

Gross Monthly Income

Date of Marriage

Date of Separation

Age; Date of Birth

SPOUSE/EX-SPOUSE/OTHER PARENT INFORMATION:

Name

Address

City, State , Zip

Cell phone

Home phone

E-mail

Social Security Number

Employer

Occupation

Gross Monthly Income

Age; Date of Birth

CHILDREN OF THE MARRIAGE/RELATIONSHIP

Child #1 Name

Age

Birth Place

Male Choice 1

Female Choice 2

Child #2 Name

Age

Birth Place

Male Choice 1

Female Choice 2

Child #3 Name

Age

Birth Place

Male Choice 1

Female Choice 2

Address of Children:

Same as "client" address

Address of Children
if less than 5 years

Dates at this address

PROPERTY:

Family Residence

Date of Purchase

Purchase Price
Loan Balance

Fair Market Value

How is title held Separate Property
 Community Property
 Joint Tenancy
 Tenancy in Common

Other Property

Date of Purchase

Purchase Price
Loan Balance

Fair Market Value

How is title held Separate Property
 Community Property
 Joint Tenancy
 Tenancy in Common

AUTO/BOAT/MOTORCYCLE

Year/Make/Model
Amount Owed \$
Fair Value
Date of Purchase

Year/Make/Model
Amount Owed \$
Fair Value
Date of Purchase

Year/Make/Model
Amount Owed \$
Fair Value
Date of Purchase

Year/Make/Model
Amount Owed \$
Fair Value
Date of Purchase

BANK ACCOUNTS

Bank Name
Balance \$

Account Type Checking
 Savings
 Other

Bank Name
Balance \$

Account Type Checking
 Savings
 Other

LIFE INSURANCE

Name of Policy

Cash Value Yes
 No

Name of Policy

Cash Value Yes
 No

STOCKS, BONDS, OTHER INVESTMENTS (OTHER THAN RETIREMENT ACCOUNTS)

1. Description

Market Value
Date Acquired

2. Description

Market Value
Date Acquired

BUSNISS INTEREST

Name of Business
Type of Business

Market Value

Date Started

Other Owners/Partners

PENSIONS/RETIREMENT

Plan Name
Employer Name

Value of Interest

Date Started

Husband
Wife

Plan Name
Employer Name

Value of Interest

Date Started

Husband
Wife

Plan Name
Employer Name
Value of Interest
Date Started

Husband
Wife

DEBTS, CREDIT CARDS, LOANS, TAXES

Name
Amount Owed

Community property debt
Husband - separate debt
Wife - separate debts

Name
Amount Owed

Community property debt
Husband - separate debt
Wife - separate debt

Name
Amount Owed

Community property debt
Husband - separate debt
Wife - separate debt

Name
Amount Owed

Community property debt
Husband - separate debt
Wife - separate debt

SEPARATE PROPERTY

List Separate Property

OTHER ASSETS

List Other Assets

HOW DID YOU HEAR ABOUT US?

Type of Referral

Client referral
Other

Internet

Yellow Pages

Who can we thank for
your referral?