



LAW OFFICES of
DRAKE OZMENT

OZ TITLE, LLC

CLIENT INTERVIEW Date: _____ How did you hear about this office? _____

Name: _____ Single Divorced Married **Spouse Name:** _____

Telephone: Home: _____ Cell: _____ Cell: _____ Work: _____

Address: _____

Children Names and Ages: _____

_____ Your e-mail address: _____

Do you **rent**? Yes No If yes, monthly rent payment: \$ _____

Do you **own**? Yes No Date of purchase: _____ Purchase Price: _____ Value: _____

1st Mortgage Company Name: _____ Balance: \$ _____

Monthly Payment: \$ _____ Are Taxes and Insurance included in your payment? Yes No

Are you delinquent? Y N How many months? _____ Have you been served? Y N Sale Date? Y N

2nd Mortgage Company Name: _____ Balance: \$ _____

Monthly Payment: \$ _____ Delinquent? Y N How many months? _____ Have you been served? Y N

Sale Date? Y N Annual Property Taxes: \$ _____ Annual Insurance: \$ _____

HOA Company Name _____ Payment: \$ _____

Monthly Quarterly Yearly Delinquent? Y N How many months? _____

How much do you owe? \$ _____ Been served? Y N Sale Date? Y N

Other Liens: _____

Car #1 Year _____ Make _____ Model _____ Loan Balance \$ _____

Monthly Payment \$ _____ Mileage _____ Value \$ _____ Purchase Date _____

Car #2 Year _____ Make _____ Model _____ Loan Balance \$ _____

Monthly Payment \$ _____ Mileage _____ Value \$ _____ Purchase Date _____

Other Vehicles: _____

Last Tax Year Filed Refund \$ _____ or Amount Owed \$ _____

Student Loan Debt Total: \$ _____ Medical bill Debt Total: \$ _____

Total Credit Card Debt and any other unsecured debt estimated total: \$ _____

How much have you charged in the last 90 days? \$ _____ All Year? \$ _____ On how many cards? _____

Employment / Monthly income: Debtor: \$ _____ Spouse: \$ _____

Family Support: \$ _____ Other Income: \$ _____

List all checking / savings accounts / Balances: _____

List all IRA, 401K, Stocks, Bonds, Annuity, Money Market accounts: _____

List all assets valued over \$1,000⁰⁰ other than home or cars listed above: _____

Lawsuits as a Plaintiff or Defendant: _____

Have you ever filed Bankruptcy before? Y N If yes, how long ago? _____ How many times? _____

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