Helpful Information to Bring to your Attorney Consultation:

1. **Income**
    a. Last Tax Returns (W2’s 1099’s K-1’s)
    b. Last pay stubs: Husband and Wife, even if only one is filling
    c. Other sources of income for past six months
    d. Disability / Retired?
2. **Expenses:** fill in attached sheet (don’t list credit card payments)
3. **Assets:**
    a. <u>Real Estate:</u> you own
    b. Time Shares
    c. Information about property <u>you used to own</u> within the past 6 years
    d. <u>Vehicles</u>: Whose name is on title? Current loan balance or monthly payments remaining? Whose name is on any lease and remaining term? Other people liable for loan or lease?
    e. <u>Bank accounts</u>: (savings, checking)
       Open Accounts: balances and large transactions within 2 years.
       Accounts Closed within 2 years: What happened to the money?
    f. Stocks, Mutual Funds, Annuities
    g. Transfers or Gifts: did you give away property or large amounts of money within 6 years?
    h. <u>Tax refunds</u>: when received and what did you use money for
    i. <u>Lawsuits</u>: Have you sued anyone within 6 years- received any awards?
    j. Retirement accounts: Name of plans, date joined, balanced.
    k. Businesses?
    l. Life insurance?
4. **Debts:**
    a. Credit cards, personal loans, medical bills, repossession deficiencies
    b. Mortgage: Balances, monthly payment, date of last payment

[i] F:\WP50\FORMS\BCY\getting started\What to Bring to your Free consultation (short list).wpd