

Client Credit Report Questionnaire

Last Name _____ First _____ Middle _____

Current address _____

Social Security # _____ / _____ / _____ Date of Birth _____ / _____ / _____

Spouse Name _____

Spouse Social # (if on any accounts jointly) _____ / _____ / _____ Spouse Date of Birth _____ / _____ / _____

Home Phone (_____) _____ - _____ Cell Phone (_____) _____ - _____

Office Phone (_____) _____ - _____

It is more expedient and efficient to communicate with you regarding your case via email. Can we communicate with you through email? _____. Email Address _____

Employer _____

Have you ever filed for Bankruptcy? _____ When? _____ Case number (if known) _____. It will be helpful if you bring a copy of your bankruptcy documentation to our first meeting. Sometimes accounts that are discharged in bankruptcy erroneously remain on your credit file with outstanding balances, re-aged, or remain in on-going collections.

Have you attempted to correct the credit report error on your own behalf? _____ How? _____

Have you ordered your credit report within the past 12 months? _____ When _____

Are you and your spouse both applying for a loan? **Circle one** Just me or Both of us are applying

How long does our firm have (time frame) to assist you regarding this matter? Are you up against any deadlines? _____ What and When are your deadlines _____

Can you pay the attorney retainer fee for our services? _____ Would you like to take advantage of our ACH Debit program where our fees are paid over time and is automatically deducted monthly from your bank account? _____

If yes, then complete the enclosed ACH DEBIT form and the Attorney will discuss the details of this program at our first meeting.

Please complete this page for each account:

You may require additional pages. Please Copy this page if you have several accounts that you would like our firm to research for you. Please be specific as possible when describing your problem with the account as reported by the credit reporting bureaus.

Creditor (or company listed on your credit report) _____

Account # _____

Address _____

Creditor's Phone# (_____) _____ - _____ Extension _____

Creditor's Fax# (if known) (_____) _____ - _____

Name of representative you have communicated regarding your account: _____

Creditor Representative's email address (if known) _____

Is this a joint account? _____ (if yes) Joint account holder's name _____

Approximate date of last communication with creditor regarding this account ____/____/____

When was this account opened? ____/____/____

If you Defaulted on this account, what is the **FIRST month and year** you stopped making payments? ____/____/____

When did you make your last payment regarding this account? ____/____/____. To whom did you make this payment. Example (original creditor's name) or (collection company) _____

Have you entered into any payment plans with the creditor regarding this account (after default)? Please describe plan and dates of payment _____

Was this account sold or transferred by the original creditor to a collection company? _____ To Whom was it transferred to? _____

Describe your problem with this account as it has been reported by the credit bureaus and what you have done to remedy the problem?

Please contact our office prior to our first meeting to discuss any questions you may have and to **confirm our scheduled meeting time**. Please bring all relevant documentation regarding this account to our first meeting.