

LAW OFFICE OF MATTHEW GARY EVANS
16 NORTH MARENGO AVENUE, ROOM 219
PASADENA, CALIFORNIA 91101
phone (626) 405-9448 cell (213) 842-6645 fax (626) 768-7565
email matthew@matthewgaryevanslaw.com
web www.matthewgaryevanslaw.com

CONFIDENTIAL CLIENT FINANCIAL QUESTIONNAIRE

Clients (Full Names of Each): _____

Home/Cell/Work Phone Number(s): _____

Email address: _____

Home address: _____

Value of home: \$ _____

Source of valuation (such as appraisal, internet websites, property tax assessment):

Total debt against home (all liens, including mortgages, mechanic's liens, attorney's liens, property tax liens, DA liens, etc.): \$ _____

Unpaid principal balances of mortgages: (1st) \$ _____ (2nd) \$ _____

Total amount in all bank and stock accounts (for all clients combined): \$ _____

Total amount of all credit card debt (for all clients combined): \$ _____

Remaining balance on all cars combined, if any: \$ _____

Year/make/model/trim of car: _____

Value of car: _____

Average total household gross income (before taxes) from all worldwide sources (employment, public benefits, rental property, gifts, inheritances, etc., for all household members regardless of whether the source of income was domestic or foreign) for the last six months (add up all income from the last 6 months and divide by 6): \$ _____

Total monthly household expenses (including home loans, property taxes, property insurance, rent, renter's insurance, utilities, groceries, spousal/child support, payments for the support of dependents, car loans, car insurance, gas, other transportation expenses, home repairs and maintenance, student loans, etc.): \$ _____

| | | | | |
|--|---|---|---|----------------------------------|
| Average Monthly Household Income (from last 6 months) | - | TOTAL Monthly Household Expenses (not average) | = | Disposable Monthly Income |
| | - | | = | |