

LAW OFFICES
LAURA MARGULIES & ASSOCIATES, LLC
6205 EXECUTIVE BOULEVARD
ROCKVILLE, MARYLAND 20852

Greenbelt Office
8957-A Edmonston Rd.
Greenbelt, MD 20770

Laura J. Margulies*
Craig W. Stewart*

Telephone: (301) 816-1600
Fax: (301) 816-1611
www.Law-Margulies.com

Hagerstown Office
240 South Potomac St.
Hagerstown, MD 21740

*Admitted in MD & DC

CONFIDENTIAL INITIAL MEETING QUESTIONNAIRE

Date: ____ / ____ / ____

PERSONAL

Name (s): (a) _____ / (b) _____
Address: Street: _____ Apt. _____
City: _____ State: _____ Zip: _____
Phone: Home: _____ Work: _____
Cell: _____ Email: _____
Social Security Number: (a) _____ - _____ - _____ (b) _____ - _____ - _____
Date (s) of Birth: (a) _____ (b) _____
Marital Status: *Circle*: single/married/divorced/separated/widowed/other _____
Dependants: Yes ____ No ____ If yes, how many? _____

RESIDENCE

Own ____ Rent ____ Monthly payment \$ _____
If own, Current value of house \$ _____ Full balance of mortgage(s) \$ _____
Are you current on mortgage? Yes ____ No ____ If not, how many months are you behind? ____
Are you facing a foreclosure? Yes ____ No ____
Do you own any other properties? Yes ____ No ____ If yes, how many? _____

<u>DEBTS</u>	<u>TOTAL BALANCE OWED</u>	<u>DEBTS</u>	<u>TOTAL BALANCE OWED</u>
Credit Cards	\$ _____	Taxes	\$ _____ Year(s) ____
Medical Bills	\$ _____	Personal Loans	\$ _____
Student Loans	\$ _____	Child Support	\$ _____

Do you have any pending lawsuits? Yes ____ No ____
If yes, are your wages or bank accounts being garnished? Yes ____ No ____

ASSETS (current balance or fair market value)

Bank accounts: \$ _____
Car 1: Year: _____ Make: _____ Model: _____ Value: \$ _____ Loan: \$ _____
Car 2: Year: _____ Make: _____ Model: _____ Value: \$ _____ Loan: \$ _____
Other Vehicle (s): _____

INCOME

Your annual gross income \$ _____ Spouse's annual gross income \$ _____
Occupation: _____ Occupation: _____

HOW DID YOU HEAR OF US?

____ Hyatt _____ Internet _____ Bar Referral
____ CLC _____ Findlaw.com _____ Mail
____ Yellow Book MD _____ Lawyers.com _____ Other
____ Attorney _____ YellowPages.com
____ Friend/Relative _____ Google.com

*We are a Debt Relief Agency:
We proudly help people file for bankruptcy relief under the Bankruptcy Code.
Consultation Agreement*

And

Acknowledgement of Receipt of Disclosure and Instruction

This Agreement is entered into on this ____ day of _____, 20____, by and between _____, (hereinafter referred to as the "Client" whether one or more) and Laura Margulies and Associates, LLC (hereinafter the "Attorney").

Client has requested the opportunity to consult with and obtain information and advice from the attorney obtaining relief from debts, including relief from debts by filing bankruptcy under the United States Bankruptcy Code. This agreement is for purposes of that consultation only. If at the end of the initial consultation, the parties agree that the Attorney is to provide any additional services short of being retained to file a bankruptcy, the parties shall enter into a new contract setting forth the additional services the Attorney is to provide to the Client. With respect to the consultation, parties agree as follows:

1. Attorney shall provide the Client the following services
 - a. Analyze the client's financial circumstances based on information provided by the Client
 - b. To the extent possible, based on the information provided by the Client, advise the Client on the Client's options and non-bankruptcy options.
 - c. If the Client has not provided the Attorney with sufficient information upon which to fully advise the Client on the Client's options, inform the Client what information the Client needs to provide to enable the Attorney to provide such advice and information.
 - d. Advise the Client of the requirements placed upon the Client to file a chapter 7 or 13 bankruptcy
 - e. To the extent possible, quote the Client an estimated fee for the Attorney's services to provide bankruptcy assistance or other legal services to the Client.
2. The Client acknowledges that the first date upon which the Attorney has first offered to provide any bankruptcy assistance service is this date, and that the Attorney provided the Client with the Notice to Client Who Contemplates Filing Bankruptcy 342(b), the Statements Mandated by Sections 527(a)(2) and (b) of the Bankruptcy Code, and the Instructions on Providing Information Required to File Bankruptcy.
3. Condition of Free Consultation

Client understands that Attorney offers a free initial consultation as an accommodation to potential clients, and does NOT offer a free initial consultation for the purpose of providing information or answers to people who intend to file bankruptcy without an attorney. Obtaining a free initial consultation with the intention of filing bankruptcy without an attorney is an act of fraud and deception. Therefore, Client understands that if Client files bankruptcy without an attorney, Attorney will assume that Client acted in bad faith in obtaining a free initial consultation, and that it was Client's intention to obtain valuable services without paying for them, in which event, Client understands that Client will be billed for the normal consultation fee of \$200.00, and that Client will also be responsible for all punitive damages, attorney fees and collection costs awarded in regard thereto.

Date: _____
Prospective Client

Date: _____
Prospective Client

Date: _____
Law Offices of Laura Margulies & Associates, LLC