

STREAMLINE INTAKE FORM

Name:		Name:	
Address:		Address:	
Home:		Home:	
Work:		Work:	
Cell:		Cell:	
E-mail:		E-mail:	
Date of Birth:		Date of Birth:	
Employer(s):		Employer(s):	
Address:		Address:	
Start Date:		Start Date:	
Occupation:		Occupation:	
# of hours worked per week:		# of hours worked per week:	
Gross Annual Income:		Gross Annual Income:	
If Unemployed:		If Unemployed:	
Date Job Ended:		Date Job Ended:	
Most Recent Employer:		Most Recent Employer:	
Salary:		Salary:	
Date of Marriage:		Petitioner:	
Date of Separation:		Respondent:	
Date of Filing:			
Children Info			
Name:		DOB:	
Name:		DOB:	
Name:		DOB:	
Name:		DOB:	

**Modest Means Financial Questionnaire – Beyond Initial Intake
Streamlined Collaborative Process**

Thank you for considering the streamlined collaborative process for your case.

We would like to get some information to help us understand your financial circumstances. The professionals who consider working with you will review your responses and your entire financial picture, along with their own current caseload, to determine whether they are willing and able to work with you at a reduced fee.

We know living in the Bay Area is expensive and a unique context for assessing which families are of “modest means” – we live here, too. This questionnaire was developed with an eye towards this context.

1. Do your children have any special financial needs? If so, what are they?
2. Besides your children, is anyone within your household(s) or family dependent on others for their care? What kind of dependence?
3. Besides your job(s), what are your other sources of income, if any? How much do you receive from each source, annually? Please give us the same information regarding your partner/spouse.
 - Regular gifts you receive from others (\$500+)
 - Trust, investment or other distributions.
 - Rental income (minus expenses associated with renting out your property)
 - Independent contractor work
 - Self-employment (minus expenses associated with running your own business)
 - Any other sources of income you or your partner/spouse have that are not specifically listed here.
4. How much do you and/or your partner/spouse have in checking and/or savings accounts?
5. Do you and/or your partner/spouse have cash in excess of \$1000?
6. Do you and/or your partner/spouse have any gold or precious metals as an investment?
7. How much do you and/or your spouse have in stocks, stock options, bonds or other non-retirement investments?
8. How much do you have in retirement accounts (IRA, 401k, 403b, etc.) in your name?

9. How much does your partner / spouse have in retirement accounts (IRA, 401K, 403B, etc.) in his/her name?
10. Do you and/or your partner / spouse have any kind of pension (state, federal, corporate, union, military, etc)? Please list name and estimate length of service under each.
11. Do you and/or your partner/spouse own or have **any** interests in real property (houses, land)? This includes any interests in any real property you may co-own with others besides your partner/spouse. Where are those properties, and what interests do either or both of you hold?
12. Please give your best estimate of the current fair market value of the property(ies).
13. Please provide the current balance owing of all debts against the property(ies) (including mortgage(s) or home equity loans, lines of credit, tax liens and any other debts associated with the property(ies)).
14. Please list all debts you and/or your partner/spouse owe, including the type of debt and how much is owing.
15. Is there anything else you would like us to know about your current debt situation?
16. Please give us your best estimate of your and/or your partner/spouse's ability to borrow money, including from the following sources:
 - Equity in house or other real property
 - Credit cards
 - Family / friends
 - Loans against retirement account(s)
 - Other sources
17. Do you and/or your partner/spouse have the same amount of access to the income and assets listed above?
18. How do you plan to pay for our services?
19. Is there anything else you would like us to know about your financial situation?