



## EDMONDSON LAW, PLLC

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### **Potential Client Initial Interview Form -Property Sketch-**

\*\*\*\* **PERSONAL AND CONFIDENTIAL** \*\*\*\*

Please fill out this questionnaire and return it to the receptionist along with the engagement agreement signed by you and the retainer amount. It is important that you answer each question fully. It is imperative that you be candid!

You should answer all questions relevant to your case. If a question does not apply to your particular situation, please indicate by marking the question “N/A.” If the answer to any question requires more space than has been provided on the form, please complete your answer on a separate sheet: Refer to the question number to which your answer applies, and attach your answer to this questionnaire.

Your responses to these questions will help to organize your case and will save you money on attorney’s fees in trying to gather and assemble information after the case is in progress. Since your answers are being made to an attorney, you are assured of confidentiality and are protected by the attorney-client privilege.

### **NOTICE OF CONFIDENTIALITY**

THE INFORMATION IN THIS DOCUMENT IS SUBJECT TO THE ATTORNEY-CLIENT PRIVILEGE, AS PROVIDED IN THE TEXAS RULES OF EVIDENCE. HOWEVER, IF A PROFESSIONAL, INCLUDING AN ATTORNEY OR AN EMPLOYEE OF AN ATTORNEY, HAS CAUSE TO BELIEVE THAT A CHILD HAS BEEN ABUSED OR NEGLECTED OR MAY BE ABUSED OR NEGLECTED OR THAT A CHILD IS A VICTIM OF AN OFFENSE UNDER SECTION 21.11 OF THE TEXAS PENAL CODE, AND THE PROFESSIONAL HAS CAUSE TO BELIEVE THAT THE CHILD HAS BEEN ABUSED AS DEFINED BY SECTION 261.001 OF THE TEXAS FAMILY CODE, THE PROFESSIONAL SHALL MAKE A REPORT NOT LATER THAN THE FORTY-EIGHTH HOUR AFTER THE HOUR THE PROFESSIONAL FIRST SUSPECTS THAT THE CHILD HAS BEEN OR MAY BE ABUSED OR NEGLECTED OR IS A VICTIM OF AN OFFENSE UNDER SECTION 21.11 OF THE TEXAS PENAL CODE. THE REPORT SHALL BE MADE TO THE APPROPRIATE AGENCY.

THE CONTENTS OF THIS DOCUMENT CONSTITUTE ATTORNEY WORK PRODUCT.

THE CONTENTS OF THIS DOCUMENT ARE CONFIDENTIAL AND ARE NOT TO BE DISCLOSED TO THIRD PERSONS OTHER THAN THOSE TO WHOM DISCLOSURE IS MADE IN FURTHERANCE OF THE RENDITION OF PROFESSIONAL LEGAL SERVICES.

**PROPERTY SKETCH**

1. **REAL PROPERTY**

*Include any property purchased by contract for deed, such as Texas Veterans Land Board property, property purchased in recreational developments, and time-shares.)*

Street address: \_\_\_\_\_ Year Bought: \_\_\_\_\_  
Estimated Fair Market Value: \$ \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_  
Mortgage Company: \_\_\_\_\_ Monthly Payments: \$ \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Names on Deed: \_\_\_\_\_  
Other liens against property: \_\_\_\_\_  
Current net equity in property: \$ \_\_\_\_\_

Street address: \_\_\_\_\_ Year Bought: \_\_\_\_\_  
Estimated Fair Market Value: \$ \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_  
Mortgage Company: \_\_\_\_\_ Monthly Payments: \$ \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Names on Deed: \_\_\_\_\_  
Other liens against property: \_\_\_\_\_  
Current net equity in property: \$ \_\_\_\_\_

Street address: \_\_\_\_\_ Year Bought: \_\_\_\_\_  
Estimated Fair Market Value: \$ \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_  
Mortgage Company: \_\_\_\_\_ Monthly Payments: \$ \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Names on Deed: \_\_\_\_\_  
Other liens against property: \_\_\_\_\_  
Current net equity in property: \$ \_\_\_\_\_

Street address: \_\_\_\_\_ Year Bought: \_\_\_\_\_  
Estimated Fair Market Value: \$ \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_  
Mortgage Company: \_\_\_\_\_ Monthly Payments: \$ \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Names on Deed: \_\_\_\_\_  
Other liens against property: \_\_\_\_\_  
Current net equity in property: \$ \_\_\_\_\_

2. **BANK ACCOUNTS, SAVINGS ACCOUNTS, C.D.'S, CREDIT UNION, SAVINGS BONDS**

Name of financial institution: \_\_\_\_\_  
Name Account name: \_\_\_\_\_  
Type of account: \_\_\_\_\_ Account Number: \_\_\_\_\_  
Name(s) on withdrawal cards: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

Name of financial institution: \_\_\_\_\_  
Name Account name: \_\_\_\_\_  
Type of account: \_\_\_\_\_ Account Number: \_\_\_\_\_  
Name(s) on withdrawal cards: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

Name of financial institution: \_\_\_\_\_  
Name Account name: \_\_\_\_\_  
Type of account: \_\_\_\_\_ Account Number: \_\_\_\_\_  
Name(s) on withdrawal cards: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

Name of financial institution: \_\_\_\_\_  
Name Account name: \_\_\_\_\_ Account Number: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Name(s) on withdrawal cards: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

3. **MOTOR VEHICLES, BOATS, AIRPLANES, CYCLES, TRAILERS**

*Include mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles.*

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_

In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
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Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

Year: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Original Loan Amount: \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_  
Value if sold today: \$ \_\_\_\_\_

4. **STOCKS, MUTUAL FUNDS & RETIREMENT ACCOUNTS**

Name of account: \_\_\_\_\_

Name & Address of brokerage firm/mutual fund: \_\_\_\_\_

Name account held in: \_\_\_\_\_

Estimated amount invested: \_\_\_\_\_

Value of total community interest in each account (and sub-accounts if any)  
(as of \_\_\_\_\_): \_\_\_\_\_

Name of account: \_\_\_\_\_

Name & Address of brokerage firm/mutual fund: \_\_\_\_\_

Name account held in: \_\_\_\_\_

Estimated amount invested: \_\_\_\_\_

Value of total community interest in each account (and sub-accounts if any)  
(as of \_\_\_\_\_): \_\_\_\_\_

Name of account: \_\_\_\_\_

Name & Address of brokerage firm/mutual fund: \_\_\_\_\_

Name account held in: \_\_\_\_\_

Estimated amount invested: \_\_\_\_\_

Value of total community interest in each account (and sub-accounts if any)  
(as of \_\_\_\_\_): \_\_\_\_\_

Name of account: \_\_\_\_\_

Name & Address of brokerage firm/mutual fund: \_\_\_\_\_

Name account held in: \_\_\_\_\_

Estimated amount invested: \_\_\_\_\_

Value of total community interest in each account (and sub-accounts if any)  
(as of \_\_\_\_\_): \_\_\_\_\_

5. **LIFE INSURANCE AND ANNUITIES**

Name of insurance company: \_\_\_\_\_

Insuring Life of: \_\_\_\_\_ Value: \_\_\_\_\_

Name of insurance company: \_\_\_\_\_

Insuring Life of: \_\_\_\_\_ Value: \_\_\_\_\_

Name of insurance company: \_\_\_\_\_

Insuring Life of: \_\_\_\_\_ Value: \_\_\_\_\_

6. **RETIREMENT, PENSIONS & OTHER COMPANY BENEFITS**

Do you have any stock options? (including any exercisable, nonexercisable, vested and nonvested stock options regardless of any restrictions on transfer):

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Does your spouse have any stock options? (including any exercisable, nonexercisable, vested and nonvested stock options regardless of any restrictions on transfer):

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Have you received or anticipate any bonuses this year? \_\_\_\_\_ If yes, what is the amount or anticipated amount? \$ \_\_\_\_\_ From what company? \_\_\_\_\_

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Has your spouse received or anticipate any bonuses this year? \_\_\_\_\_ If yes, what is the amount or anticipated amount? \$ \_\_\_\_\_ From what company? \_\_\_\_\_

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Do you or your spouse have any closely held business interests (including sole proprietorships, professional practices, corporations, partnerships, limited liability companies and partnerships, joint ventures, and other nonpublicly traded business entities)? \_\_\_\_\_ If yes, please explain: \_\_\_\_\_

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Do you participate in any Retirement Plan? \_\_\_\_\_

Does your spouse participate in any Retirement Plan? \_\_\_\_\_

Do you participate in any Company Savings Plan? \_\_\_\_\_  
If so, how much do you have in said savings plan? \$ \_\_\_\_\_

Does your spouse participate in any Company Savings Plan? \_\_\_\_\_  
If so, how much does your spouse have in said savings plan? \_\_\_\_\_

Are you or your spouse entitled to any Military Benefits? \_\_\_\_\_

Are you or your spouse entitled to any Government Benefits (civil service, teacher, railroad, state and local)?

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Are you or your spouse entitled to any Union Benefits? \_\_\_\_\_

Are you or your wife entitled to any other deferred compensation benefits (e.g., worker's compensation, disability benefits, other "special payments", and other compensation)?

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7. **MISCELLANEOUS**

Do you own any livestock? \_\_\_\_\_

Do you own any mineral interests? \_\_\_\_\_

Do you belong to any clubs with an equity interest? \_\_\_\_\_ If so, where? \_\_\_\_\_

Are you involved in any lawsuits? \_\_\_\_\_ If so, explain: \_\_\_\_\_

Do you have any frequent flyer miles or points? \_\_\_\_\_

Does anyone owe you or your spouse any money? \_\_\_\_\_

If so, who and how much? \_\_\_\_\_

8. **DEBTS**

*Credit Cards*

Name of Financial Institution: \_\_\_\_\_

Primary Cardholder Name: \_\_\_\_\_

Authorized User Names: \_\_\_\_\_

Credit Limit Amount: \$ \_\_\_\_\_

Account Balance (as of \_\_\_\_\_): Account Number: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Primary Cardholder Name: \_\_\_\_\_

Authorized User Names: \_\_\_\_\_

Credit Limit Amount: \$ \_\_\_\_\_

Account Balance (as of \_\_\_\_\_): Account Number: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Primary Cardholder Name: \_\_\_\_\_

Authorized User Names: \_\_\_\_\_

Credit Limit Amount: \$ \_\_\_\_\_

Account Balance (as of \_\_\_\_\_): Account Number: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Primary Cardholder Name: \_\_\_\_\_

Authorized User Names: \_\_\_\_\_

Credit Limit Amount: \$ \_\_\_\_\_

Account Balance (as of \_\_\_\_\_): Account Number: \_\_\_\_\_

*Those debts other than house and/or automobile loans or credit cards, such as school loans, medical bills, etc.*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

9. **SEPARATE PROPERTY**

Do you own any separate property (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)?

\_\_\_\_\_

If so, please provide the following information:

Description of asset: \_\_\_\_\_

Date property acquired: \_\_\_\_\_

How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

Does your spouse own any separate property (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)? \_\_\_\_\_

If so, please provide the following information:

Description of asset: \_\_\_\_\_

Date property acquired: \_\_\_\_\_

How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

10. **BANKRUPTCY**

Are you and/or your spouse currently involved in any type of bankruptcy proceeding? If so, please briefly summarize the current status of the bankruptcy.

\_\_\_\_\_  
\_\_\_\_\_

11. **INCOME TAX**

Have you filed for all previous years? \_\_\_\_\_

Prepared by whom? \_\_\_\_\_

Refund received? \_\_\_\_\_ If so, how much? \$ \_\_\_\_\_

Money owed? \_\_\_\_\_ If so, how much? \$ \_\_\_\_\_

**YOUR SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_