

Client Worksheet

Date

Title

First Name

M.I.

Last Name

Address

Address

Address

Phone

Fax

Start Month

1

2

3

4

5

6

7

8

9

10

11

12

Repayment Plan

☐ Immediate

☐ Deferred

Pledge Money

| Creditor Name | APR | Starting Balance | Monthly Payment | Loan |   |
|---------------|-----|------------------|-----------------|------|---|
| 1             | 1   | 1                | 1               | Y    | N |
| 2             | 2   | 2                | 2               | Y    | N |
| 3             | 3   | 3                | 3               | Y    | N |
| 4             | 4   | 4                | 4               | Y    | N |
| 5             | 5   | 5                | 5               | Y    | N |
| 6             | 6   | 6                | 6               | Y    | N |
| 7             | 7   | 7                | 7               | Y    | N |
| 8             | 8   | 8                | 8               | Y    | N |
| 9             | 9   | 9                | 9               | Y    | N |
| 10            | 10  | 10               | 10              | Y    | N |
| 11            | 11  | 11               | 11              | Y    | N |
| 12            | 12  | 12               | 12              | Y    | N |
| 13            | 13  | 13               | 13              | Y    | N |
| 14            | 14  | 14               | 14              | Y    | N |
| 15            | 15  | 15               | 15              | Y    | N |
| 16            | 16  | 16               | 16              | Y    | N |
| 17            | 17  | 17               | 17              | Y    | N |
| 18            | 18  | 18               | 18              | Y    | N |
| 19            | 19  | 19               | 19              | Y    | N |
| 20            | 20  | 20               | 20              | Y    | N |
| 21            | 21  | 21               | 21              | Y    | N |
| 22            | 22  | 22               | 22              | Y    | N |
| 23            | 23  | 23               | 23              | Y    | N |
| 24            | 24  | 24               | 24              | Y    | N |
| 25            | 25  | 25               | 25              | Y    | N |
| 26            | 26  | 26               | 26              | Y    | N |
| 27            | 27  | 27               | 27              | Y    | N |
| 28            | 28  | 28               | 28              | Y    | N |
| 29            | 29  | 29               | 29              | Y    | N |
| 30            | 30  | 30               | 30              | Y    | N |