MBA FINANCIAL TAX & ACCOUNTING LLC | TaxDebtWise.com
IRS & State Tax Resolution | Tax Preparation | Accounting | Debt-to-Wealth Strategies
4106 E. Wilder Road #288, Bay City, MI 48706 | (989) 686-6633 | Toll-Free (877) 306-2246 | Fax (989) 364-2024
trustmba@aol.com | www.taxdebtwise.com | Secure Portal: mbafinancial.logicsportal.com

DEBT SOLUTIONS INTAKE FORM

TaxDebtWise by MBA Financial Tax & Accounting LLC

Complete what you know so we can better understand your debt, payment pressure, collection activity, cash flow, and financial goals. Debt-reduction planning is not a promise of a specific savings amount, payoff date, settlement, creditor decision, credit-score improvement, or financial result. The purpose is to review the facts and identify practical next steps.

URGENT DEADLINE: If you received lawsuit papers, a summons or complaint, garnishment paperwork, levy notice, lien notice, repossession or foreclosure notice, or any court response deadline, call (989) 686-6633 immediately before relying on this form.

SECURITY: Do not enter Social Security numbers, bank-account numbers, full card numbers, passwords, or confidential financial records on an unsecured copy. Use the secure client portal for confidential documents.

1. CONTACT & HOUSEHOLD / BUSINESS INFORMATION

First Name * ______________________________

Last Name * ______________________________

Email Address * ______________________________

Best Phone Number * ______________________________

Street / Mailing Address ______________________________

City, State & ZIP ______________________________

Best Time to Contact ______________________________

Preferred Contact: ☐ Call ☐ Text ☐ Email ______________________________

You are contacting us as: *

☐ Individual ☐ Business ☐ Both Individual & Business

Business / Entity Name, if applicable: ______________________________

Household size ______________________________

Number of income earners ______________________________

Monthly gross household income ______________________________

Monthly take-home household income ______________________________

2. DEBT OVERVIEW

Debt type(s): *

☐ Credit Cards ☐ Personal Loans ☐ Medical Bills
☐ Collections ☐ Vehicle Loans ☐ Mortgage / Home Equity
☐ Tax Debt ☐ Business Debt ☐ Student Loans
☐ Judgments ☐ Other

Approximate total debt * ______________________________

Approximate monthly debt payments * ______________________________

Approximate secured debt ______________________________

Approximate unsecured debt ______________________________

Overall account status: *

☐ Current ☐ Behind on Payments
☐ In Collections ☐ Charged Off
☐ In Court ☐ Mixed Status
☐ Not Sure

Are any debts related to taxes?

☐ Yes - IRS ☐ Yes - State / Local
☐ No ☐ Not Sure

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3. CREDITOR / ACCOUNT SUMMARY

List the largest or most urgent debts first. Do not include complete account numbers; use only the creditor name and last four digits if needed.

Creditor / Collector	Debt Type	Approx. Balance	Monthly Payment	Status / Days Behind	Deadline / Notes

4. COLLECTION, LAWSUIT & URGENCY REVIEW

Have you received any of the following? *

☐ Collection Letters
☐ Demand Letter
☐ Summons / Complaint / Lawsuit Papers
☐ Judgment Notice
☐ Wage Garnishment Notice
☐ Bank Levy / Restraint Notice
☐ Lien Notice
☐ Repossession Notice
☐ Foreclosure / Default Notice
☐ Tax Collection Notice
☐ None / Not Sure

Is there a court date, answer deadline, hearing, sale date, or urgent response date? *

☐ No ☐ Yes ☐ Not Sure

Urgent date / deadline

____

Court / agency / creditor involved

____

Describe the most urgent collection or court activity Include the notice date, deadline, and what the creditor or collector is demanding.

5. MONTHLY CASH-FLOW SNAPSHOT - APPROXIMATE AMOUNTS

Housing - rent / mortgage

____

Utilities

____

Food / household supplies

____

Vehicle payments

____

Fuel / transportation

____

Insurance

____

Medical / prescriptions

____

Child / dependent care

____

Taxes / tax payment plans

____

Other necessary monthly expenses

____

Approximate monthly amount left after necessities

____

Approximate amount available for debt payments

____

Are you currently using credit or loans to cover basic living expenses?

☐ Yes
☐ No
☐ Sometimes
☐ Not Sure

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Has household or business income changed recently?

☐ Income Increased
☐ Income Decreased
☐ No Significant Change
☐ Not Sure

Describe any financial hardship or recent change Examples: reduced hours, job loss, medical expense, divorce, caregiving, business decline, retirement, or other event.

6. ASSETS & SECURED OBLIGATIONS - HIGH-LEVEL ONLY

Do not provide account numbers. Approximate values are enough for initial strategy review.

Approximate cash / savings
____

Approximate retirement assets
____

Approximate home / real estate equity
____

Approximate vehicle equity
____

Other major assets
____

Business assets, if applicable
____

Are any major assets currently at risk?

☐ No
☐ Vehicle Repossession Risk
☐ Foreclosure Risk
☐ Lien / Judgment Risk
☐ Tax Levy / Seizure Risk
☐ Not Sure

7. PRIOR DEBT EFFORTS

Have you already tried any of the following?

☐ Budgeting / Snowball / Avalanche Plan
☐ Creditor Hardship Program
☐ Direct Settlement Negotiation
☐ Debt Management Plan
☐ Debt Settlement Company
☐ Consolidation Loan
☐ Refinance / Home Equity
☐ Bankruptcy Consultation
☐ Tax Resolution Program
☐ None / Not Sure

What worked, what did not, and what are you currently paying under any plan?

8. GOALS & REQUESTED HELP

What do you want help with? *

☐ Budgeting
☐ Debt Prioritization
☐ Repayment Strategy
☐ Debt Settlement Options
☐ Tax Debt
☐ Cash-Flow Restructuring
☐ Plan for Collections / Charged-Off Accounts
☐ Prepare for Creditor Negotiation
☐ Coordinate Tax Debt with Other Debts
☐ Long-Term Debt-to-Wealth Strategy
☐ All of the Above
☐ Other / Not Sure

What would make the biggest difference over the next 30-90 days?

Briefly describe your situation and financial goals * Include as much information as you can. This helps us review your situation before contacting you.

9. DOCUMENTS AVAILABLE

Which documents do you currently have?

☐ Recent Creditor Statements
☐ Collection Letters
☐ Court / Lawsuit Papers
☐ Garnishment / Levy Papers
☐ Mortgage / Vehicle Statements
☐ Recent Pay Stubs
☐ Bank Statements
☐ Household Budget
☐ Business Financial Statements
☐ Tax Notices / Tax Records
☐ Other

NEXT STEP: Use the secure client portal for confidential documents: mbafinancial.logicsportal.com. If a legal or court deadline is approaching, do not wait for routine intake processing before seeking timely assistance.

10. INTAKE ACKNOWLEDGMENT

☐ I understand this intake is for preliminary financial and debt-strategy review only. Submitting it does not create a client engagement or guarantee that MBA Financial will accept the matter.

☐ I understand that creditor decisions, settlement amounts, payment terms, collection actions, court outcomes, interest, fees, credit reporting, and tax results are controlled by third parties and applicable law; no specific outcome is guaranteed.

☐ I understand MBA Financial Tax & Accounting LLC is not a substitute for legal counsel on contested lawsuits, court representation, bankruptcy, or other legal matters requiring an attorney, and I should not ignore a summons, court date, garnishment deadline, foreclosure deadline, or other legal notice.

Client / Prospective Client Name

____

Date Completed

____