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Thank you for choosing my law firm to assist you. Please fill out this form with as much detail as possible. All information you provide will be kept in the strictest confidence. When you have finished filling out this form, please return the form to me. Make sure to answer every question to the best of your ability.

I look forward to assisting you with your student loan matter(s).

Today's Date: _____ Family Size¹: _____
Marital Status: [] Married [] Single

Your Name: _____
Address: _____
City _____ State _____ Zip _____

Home Phone: _____ Work _____ Cell _____
Email Address: _____
Employment/Industry: _____

INTAKE QUESTIONNAIRE

1. What type of student loans do you have (Private, Federal, State, IDK)?
2. How much federal student loan debt do you have? _____.
3. How much private student loan debt do you have? _____.
4. What is your Adjusted Gross Income²? _____.
5. What is your current monthly payment on your federal loans? _____
6. Do you have reason to believe any of these loans are not your loans or that you did not sign for them? _____
7. Do you have a Federal Perkins Loan (if NO, skip to question #8)? _____
 If so, are you a full-time teacher serving low-income families? _____
 A speech pathologist serving low-income schools? _____
 A teacher of math, science, foreign languages, bilingual education, or other fields designated as teacher-shortage areas? _____

¹ Your family size is determined by counting you, your spouse, and your children if the children receive at least half their support from you. Your family size also includes other individuals if they (1) live with you AND (2) receive at least half their support from you and will continue to receive this support for the next year. Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, and payment of college costs. You do not have to claim people as a dependent on your taxes for this particular number.

² As indicated on your IRS tax return.

A full-time special education teacher (public or nonprofit elementary or secondary school)(Includes school psychologists, audiologists, etc.) ?___

Have you served full-time as a nurse or medical technician providing healthcare services?___.

Have you served full-time as an employee of a nonprofit child or family service agency and provided services to both high risk children who were from low-income communities and their families?___.

Have you served full-time as a qualified professional provider of early intervention services for the disabled?___

Have you served as a full-time firefighter to local, state, or federal fire departments?___

Have you served full-time as a staff member in the educational part of a Head Start preschool program?___

Have you served full-time as a law enforcement or corrections officer?___

Have you served a period of full-time active duty in the armed forces in an area of hostilities or an area of imminent danger that qualifies for special pay?_____

Have you served as a Peace Corps, AmeriCorps, or VISTA volunteer?___

Are you a full-time attorney employed in a public or community defender organization?___

Are you a librarian with a degree in Librarian Sciences serving low-income students?___

8. Are you currently in default?_____. If so, have collection actions begun (garnishment, tax refund interception, social security offset, lawsuits, etc.)_____? If collection actions have already begun, have you responded to any notices mailed to you³?_____.

9. If you are in default, can you make payments to get out of default?___ If yes, how much can you afford per month?_____ Are you active duty military?_____.

³ If you have received an administrative wage garnishment notice or any other time sensitive notice, **please do not ignore it**. Respond as soon as possible to protect your rights and prevent the automatic commencement of the garnishment even if you have not consulted with or retained an attorney. Failure to respond within the required time limit to a wage garnishment or offset notice will result in the commencement of garnishment/offset which can only be stopped if you win at an administrative hearing.

10. Are you a military veteran?_____.
 11. Are you in the Army National Guard?____
 12. Have you been a full-time teacher for five consecutive years in a low-income elementary or secondary school?____
 13. Have you consolidated any of your loans?_____. If so, do you hold a private or federal consolidation loan?_____. Have you defaulted on your consolidated loan(s)?_____.
 14. Do you or have you worked full-time at a public service job while making loan payments under the Standard, ICR, or IBR payment program?⁴_____.
 15. What are your goals regarding your current student loan debt? (ex. I want to go back to school as soon as possible, I want to get out of default, I want to stop collection actions, I want to get into a better repayment plan, etc.)
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16. Did you obtain any of your loans at a school that closed? _____
 Were you enrolled at the time of the school's closure?____
 Were you on an approved leave of absence at the time of the school's closure?____
 Did you withdraw from school within 120 days before the school's closure?_____
17. Did you have a High School diploma (or its equivalent) prior to enrollment at a school where you obtained loans?____
 If No, were you given any tests prior to enrollment?__
18. Were you enrolled at a school where you did not meet the requirements for employment (in your state of residence) in the occupation for which the training program supported by the loan was intended? ⁵ _____.
19. Do you believe that your name was forged on a loan application, promissory note, or loan check endorsement OR was any other means of identification used to obtain a student loan without your authorization? _____
20. Did you sign up for a school but never attended, withdrew from a school, or terminated your enrollment within a time frame that entitled you to a refund but you never received the refund from the school? _____
21. Are you unable to work or earn money because of a condition that can be expected to result in death AND has lasted for a continuous period of not less than 60 months OR can be expected to last for a continuous period of not less than 60 months?____. If yes, please list your documented condition(s) that make it difficult for you to work and earn money?_____

⁴ Ex. Federal, state, local, or tribal government employer, public child or family services agencies, 501(c)(3) nonprofit organizations, or tribal colleges or universities. Government employers include the military, public schools, and colleges but does not include members of Congress.

⁵ Examples- student with less than a 10th grade education attended a cosmetology school in a state that requires licensed cosmetologists to have at least a 10th grade education. Individual with felony record- trained as security guard.

22. Have you received a Social Security Administration (SSA) notice of award for SSDI or SSI benefits or an SSA Benefits Planning Query (BPQY) stating that your next scheduled disability review will be 5 to 7 years or more from the date of your last SSA disability determination?___.

23. Are you a spouse of a public servant (police officer, firefighter, rescue personnel, or member of the Armed Forces) who died or became permanently and totally disabled due to the Sept 11, 2001 attacks?___.

24. Are you a spouse or parent of an individual who died or became permanently and totally injured due to injuries suffered in the September 11, 2011 attacks?_____.

25. Do you have a determination from the Veteran's Administration that you are unemployable due to service connected disabilities?___.

26. Have you ever filed for bankruptcy?___ If yes, were your student loans listed on the bankruptcy petition?___Was an adversarial proceeding filed by you or your counsel to address your student loans?_____

27. Are you currently considering filing for bankruptcy?___

28. What is the name of your current repayment plan(s)?_____ Can you afford payments under your current plan(s)?___

29. Are you currently experiencing wage garnishment, tax offset, or social security offset?___

30. Have you been sued for a federal student loan?___ If yes, is there a default judgment?___

31. Have any collection agencies harassed you regarding the repayment of your student loans (please thoroughly explain)? (Ex. called me numerous times a day threatening to sue-- called my neighbors about my debt-- called me at work even though I have told them not to, etc.)

32. Please explain what issues you are currently having with your student loans and what you are hoping an attorney can do to assist you.
