

GENERAL INFORMATION

Please complete **ALL** of the information requested in these forms. If a question or section does NOT apply to you, write "N/A" in the space. (N/A means "not applicable") The more information you provide, the faster your bankruptcy petition can be completed. There will be a delay if we need to verify or obtain more information concerning a specific asset, debt or creditor, so please provide as much detail as you can and fill in **ALL** the information requested. Thank you for taking the time to be thorough and complete. Your efforts will result in a faster turnaround.

Name, First	Middle (spell out)	Last
Social Security Number		Date of Birth
Street Address		
City	State	Zip
County of Residence	Length of Time at This Address	
Home Phone		Other Phone
Email Address		

MAILING ADDRESS: If you would like any correspondence by the bankruptcy court to be sent to a different mailing address other than the physical address you provided above (i.e., post office box, etc.), please provide that address below:

INFORMATION ABOUT YOUR SPOUSE

SPOUSE, First Name	Middle (spell out)	Last
Social Security Number		Date of Birth
Address (if living separately)		
City	State	Zip

Have you resided in the same county for at least 180 days (6 months)? ☐ Yes ☐ No

If not, where have you resided? _____

Are you filing this bankruptcy petition with your spouse? ☐ Yes ☐ No

If "no", please check one: ☐ Unmarried ☐ Spouse filing separately ☐ Other reasons

Have you filed bankruptcy within the last eight (8) years? ☐ Yes ☐ No

If "yes", provide date(s): _____

Have you met the Debt Counseling requirement for your state? Please check one of the choices below:

☐ Counseling not completed ☐ Received counseling within the past 180 days _____
(Date Completed)

☐ Requested waiver ☐ Does not apply to my district

DEPENDENTS

Name	Age	Relationship to You	Is this person/child living with you? <input type="checkbox"/> Yes <input type="checkbox"/> No
1.			<input type="checkbox"/> Yes <input type="checkbox"/> No
2.			<input type="checkbox"/> Yes <input type="checkbox"/> No
3.			<input type="checkbox"/> Yes <input type="checkbox"/> No
4.			<input type="checkbox"/> Yes <input type="checkbox"/> No

Income History	Husband	Wife
Employer's name *Note - If more than one employer, print additional sheets		
Address		
City, State, Zip		
Telephone Number		
Length of time at this job (Years, Months)	Years _____ Months _____	Years _____ Months _____
Job Title (Do not abbreviate)		
Your name as listed on current paycheck stub		
How often do you get paid?	<input type="checkbox"/> every week	<input type="checkbox"/> every week
	<input type="checkbox"/> bi-weekly (every 2 weeks)	<input type="checkbox"/> bi-weekly (every 2 weeks)
	<input type="checkbox"/> semi-monthly (twice each month)	<input type="checkbox"/> semi-monthly (twice each month)
	<input type="checkbox"/> once a month	<input type="checkbox"/> once a month
Year-to-date total-this year		
Gross income last year		
Gross income 2 years ago		
"Average" gross wages per pay period before deductions		
"Average" extra overtime and commissions per pay period?		
Total taxes deducted per pay period-FICA, Federal, State, Local)		
Insurance deducted per pay period		
Union dues deducted per pay period		
Alimony and child support deducted per pay period	Amount _____ Court Ordered <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount _____ Court Ordered <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Income - Monthly	*****	*****
Rental income		
Alimony/child support rec'd		
Government assistance		
Public assistance		
Interests & dividends		
Social Security		
Food Stamps		
Pension /retirement		
Business - Home/Flea Mkt.		
Other income-reason & amt		

Income For Six (6) Months

Provide the total amount of earned income (from all sources) that you received for the current month and the last five (5) months - totaling six (6) months of income. **DO NOT DEDUCT TAXES.** The income you report is **NOT TAKE-HOME PAY**, but the **TOTAL INCOME BEFORE TAXES**.

Last Month2 Months Ago3 Months Ago4 Months Ago5 Months Ago6 Months Ago

Wages, salaries, tips bonuses, overtime, commissions						
Husband						
Wife						
Income from operation of business, profession or farm						
Husband						
Wife						
Rents and other property income paid to you (not paid by you)						
Husband						
Wife						
Interest income, dividends and royalties						
Husband						
Wife						
Pension and retirement income						
Husband						
Wife						
Income from others who are not filing bankruptcy with you who contribute money to the household expenses						
Husband						
Wife						
Unemployment compensation						
Husband						
Wife						
Income from other sources						

Other Information

Has either you or your spouse been known by any other name during the past 8 years?
(Example,: Maiden name, last name from previous marriage, legal name change, etc.)
If Yes, list below and dates the name was used.

☐ Yes☐ No

Name Used _____ Dates Used _____ Thru _____

Name Used _____ Dates Used _____ Thru _____

Has your income significantly increased or decreased during the past six (6) months? If so, please provide details below.

SELF-EMPLOYED BUSINESS OWNERS

If you have been self-employed during the past 12 months, please list below the normal income and expenses your business generated for an average month. If you did not have an average monthly income due to extreme highs and lows in your business, estimate your total yearly income and divide by 12 to get the average monthly income. Use the same method of determining your average monthly expenses and enter those figures into the spaces below:

Average monthly business income \$ _____

Did you withhold any earnings for tax purposes? ☐ Yes ☐ No

If yes, how much did you withhold monthly? \$ _____

Average monthly business expenses (if applicable)

Rent and utilities \$ _____

Office Supplies \$ _____

Product Supplies \$ _____

Wages \$ _____

Equipment Leases \$ _____

Other Business Leases \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Other _____ \$ _____

Total Average Monthly Income \$ _____

Total Average Monthly Expenses \$ _____

Average Monthly Business Profit \$ _____

Did you file income taxes for the years you operated your business? ☐ Yes ☐ No

If not, what years did you NOT file taxes? _____

YOUR REAL ESTATE

**NOTICE: IF YOU OWN A MOBILE HOME,
PLEASE FILL OUT NEXT PAGE**

☐ Check this box if you have a homestead exemption that exceeds \$125,000.00.

PRINT OUT ADDITIONAL PAGES FOR EVERY SEPARATE PIECE OF REAL ESTATE THAT YOU OWN.

Check the type of real estate you own: ☐ House ☐ Condominium ☐ Vacant Lot ☐ Other

Name(s) on Deed _____

Address of Real Estate _____

Description of real Estate: (example: 1,250 square foot home with 2 bedrooms, 2 baths, attached 2-car garage situated on 2 acres of ground with outbuildings.) _____

Name of Mortgage Company _____

Address _____

City _____ State _____ Zip _____

Account Number _____ Date obtained this mortgage? _____

What are the monthly payments? \$ _____ What is the pay-off amount on this mortgage? \$ _____

Are you behind in payments? ☐ **YES** ☐ **NO** If so, what months? _____

What interest rate do you pay? _____% Amount to catch up back payments: \$ _____

What year was your real estate last appraised? _____ What was the appraised value? \$ _____

Do you have a second mortgage on the real estate? ☐ **YES** ☐ **NO** Intention: ☐ **KEEP** ☐ **SURRENDER**

SECOND MORTGAGE INFORMATION (IF APPLICABLE)

Name of Mortgage Company _____

Address _____

City _____ State _____ Zip _____

Account Number _____ Date obtained this mortgage? _____

What are the monthly payments? \$ _____ What is the pay-off amount on this mortgage? \$ _____

Are you behind in payments? ☐ **YES** ☐ **NO** If so, what months? _____

What interest rate do you pay? _____% Amount to catch up back payments? \$ _____

COLLECTION INFORMATION (IF APPLICABLE)

Name of Collector for Attorney _____

Address _____

City _____ State _____ Zip _____

Is this real estate in the process of foreclosure or replevin action? ☐ **YES** ☐ **NO**

If in collection, please provide a copy of the court documents you were served.

YOUR MOBILE HOME

☐ Check this box if you have a homestead exemption that exceeds \$125,000.00

PRINT OUT ADDITIONAL PAGES FOR EVERY MOBILE HOMES THAT YOU OWN.

Name(s) on Title _____

Address of Mobile Home _____

Are the wheels completely removed from your mobile home and it is attached to the ground? ☐ YES ☐ NO

Does your mobile home sit in a mobile home park? ☐ YES ☐ NO What is the monthly lot rent? _____

Does your mobile home sit on a piece of ground you own? ☐ YES ☐ NO Size of ground _____

Do you make separate payments for the ground your mobile home sits on? _____

If so, explain: _____

If you own the ground free and clear, what is the resell value for this piece of ground? \$_____

Description of Mobile Home: (example: 28x40 doublewide, 2 bedrooms, 1 bath, on wheels with skirting and steps and 1 outbuilding shed, situated in mobile home park.) _____

Name of Mortgage Company _____

Address _____

City _____ State _____ Zip _____

Account Number _____ Date obtained this mortgage? _____

What are the monthly payments? \$_____ What is the pay-off amount on this mortgage? \$_____

Are you behind in payments? ☐ YES ☐ NO If so, what months? _____

What interest rate do you pay? _____% Amount to catch up back payments? \$_____

What year was your mobile home last appraised? _____ What was the appraised value? \$_____

SECOND MORTGAGE INFORMATION (IF APPLICABLE)

Name of Mortgage Company _____

Address _____

City _____ State _____ Zip _____

Account Number _____ Date obtained this mortgage? _____

What are the monthly payments? \$_____ What is the pay-off amount on this mortgage? \$_____

Are you behind in payments ☐ YES ☐ NO If so, what months? _____

What interest rate do you pay? _____% Amount to catch up back payments? \$_____

COLLECTION INFORMATION (IF APPLICABLE)

Name of Collector Attorney _____

Address _____

City _____ State _____ Zip _____

If in collection, please provide a copy of the court documents you were served.

[illegible]

YOUR MOTOR VEHICLES

Motor vehicles include cars, trucks, SUV's motorcycles, mobile homes, boats, trailers, campers, etc. that are TITLED IN YOUR (OR YOUR SPOUSE's NAME). **Print out more sheets if you own more than 2 vehicles.**

Type: ☐ Automobile ☐ Truck ☐ Motorcycle ☐ Mobile Home (Title Only) ☐ Other: _____

Year: _____ Make: _____ Model: _____ Style: _____ ☐ 2dr ☐ 4 dr ☐ Other

Condition: ☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ Not Running Mileage: _____

Name(s) on vehicle title? _____

Is vehicle leased? ☐ YES ☐ NO If yes, what is the "buy out" on the lease? _____

Name of company you make payments to for this vehicle: _____

Address: _____

City: _____ State: _____ Zip: _____

Account Number _____ Date Established Loan _____

Monthly Payment \$ _____ How many months are you behind in payments? _____

What is the "pay off" amount on this vehicle? \$ _____ Check one: ☐ Keep ☐ Surrender

Have you gone to a loan company and listed this vehicle as collateral for a personal loan? ☐ YES ☐ NO

If so, name of loan company for personal loan: _____

Type: ☐ Automobile ☐ Truck ☐ Motorcycle ☐ Mobile Home (Title Only) ☐ Other: _____

Year: _____ Make: _____ Model: _____ Style: _____ ☐ 2dr ☐ 4 dr ☐ Other

Condition: ☐ Excellent ☐ Good ☐ Fair ☐ Poor ☐ Not Running Mileage: _____

Name(s) on vehicle title? _____

Is vehicle leased? ☐ YES ☐ NO If yes, what is the "buy out" on the lease? _____

Name of company you make payments to for this vehicle: _____

Address: _____

City: _____ State: _____ Zip: _____

Account Number _____ Date Established Loan _____

Monthly Payment \$ _____ How many months are you behind in payments? _____

What is the "pay off" amount on this vehicle? \$ _____ Check one: ☐ Keep ☐ Surrender

Have you gone to a loan company and listed this vehicle as collateral for a personal loan? ☐ YES ☐ NO

If so, name of loan company for personal loan: _____

Personal Property	Owner H - Husband W- Wife J - Joint	Value (Yard Sale)	Lien Holder Name Address	\$ Owed
1. Cash on hand (indicate source)				
2. Checking, savings, other accounts, CDs (indicate source)				
3. Security deposits				
4. Household goods and furniture:				
Stove				
Refrigerator				
Washer/Dryer				
Microwave				
Cookware				
Flatware				
Furniture - L.R.				
Furniture - B.R.				
Furniture - D.R.				
Furniture - Kitchen				
Televisions				
VCR(s)				
DVD(s)				
Household tools				
Yard tools				
5. Collections:				
Books				
Pictures				
Art objects				
stamp				
Coin				
6. All Clothing				
7. Furs & Jewelry				
8. Firearms, sports & hobby equipment				
9. Interests in insurance policies				
10. Annuities				

Personal Property	Owner	Value	Lien Holder	\$ Owed
	H – Husb. W- Wife J - Joint	(Yard Sale)	Name Address	
11. Interests in education IRA or qualified state tuition plan				
12 Pension or profit sharing plans, IRA, ERISA, Keogh				
13. Stocks and interests in companies				
14. Interests in partnerships				
15. Government & corporate bonds				
16. Accounts receivable				
17. Alimony, maintenance, support and property settlements				
18. Other liquidated debts owing debtor, including tax refunds				
19. Equitable or future interests, life estates, etc.				
20. Interests in the estate of a decedent				
21. Other contingent and un-liquidated claims				
22. Patents, copyrights and other intellectual property				
23. Licenses, franchises and other general intangibles				
24. Customer lists				
26. Boats, motors & accessories				

Personal Property	Owner H – Husb. W- Wife J - Joint	Value (Yard Sale)	Lien Holder Name Address	\$ Owed
27. Aircraft & accessories				
28. Office equipment furnishings & supplies				
29. Machinery, fixtures, equipment & supplies used in a business				
30. Inventory				
31. Animals				
32. Crops, growing or harvested				
33. Farming equipment and implements				
34. Farm supplies, chemicals & feed				
35. Other personal property				

DEBT SHEETS

•PRINT OUT MORE PAGES IF YOU HAVE MORE THAN 15 TOTAL DEBTS.

•DO NOT JUST LIST DEBTS YOU WANT TO INCLUDE – BUT EVERY DEBT YOU OWE, EVEN LOANS FROM RELATIVES.

Name of Creditor _____

Address _____

City _____ State _____ Zip _____

Total amount you owe on this debt: \$ _____ Account No.: _____

Date (or year) you originally incurred this debt or established credit: _____

If this debt is for a credit card, what date (or year) did you last make a purchase? _____

What is this debt for? ☐ Medical ☐ Credit Card ☐ Loan ☐ Other _____

Who is financially responsible for this debt? ☐ HUSBAND ☐ WIFE ☐ BOTH ☐ OTHER _____

Has this debt been turned over to a collection agency? ☐ YES ☐ NO

Name of collection agency or law firm _____

Address _____

City _____ State _____ Zip _____

Name of Creditor _____

Address _____

City _____ State _____ Zip _____

Total amount you owe on this debt: \$ _____ Account No.: _____

Date (or year) you originally incurred this debt or established credit: _____

If this debt is for a credit card, what date (or year) did you last make a purchase? _____

What is this debt for? ☐ Medical ☐ Credit Card ☐ Loan ☐ Other _____

Who is financially responsible for this debt? ☐ HUSBAND ☐ WIFE ☐ BOTH ☐ OTHER _____

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Name of collection agency or law firm _____

Address _____

City _____ State _____ Zip _____

DEBT SHEETS (Cont'd)

Name of Creditor _____

Address _____

City _____ State _____ Zip _____

Total amount you owe on this debt: \$ _____ Account No.: _____

Date (or year) you originally incurred this debt or established credit: _____

If this debt is for a credit card, what date (or year) did you last make a purchase? _____

What is this debt for? ☐ Medical ☐ Credit Card ☐ Loan ☐ Other _____

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Address _____

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Address _____

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Who is financially responsible for this debt? ☐ HUSBAND ☐ WIFE ☐ BOTH ☐ OTHER _____

Has this debt been turned over to a collection agency? ☐ YES ☐ NO

Name of collection agency or law firm _____

Address _____

City _____ State _____ Zip _____

MONTHLY BUDGET

This form is necessary to determine how much you spend each month on living expenses. Be sure to write in the MONTHLY (not yearly) amounts in the spaces below each expenditure. For utilities, your bill may be higher in the winter than in the summer, so write an amount that is "average" covering the whole 12 month period.

Housing Expenses		Taxes	
Rent (if you do not own your home)	\$ _____	Are any other taxes deducted from your wages? If so, what type of taxes are they?	\$ _____
First Mortgage payment or mobile home monthly payment	\$ _____	Other Expenses	
Second mortgage (if applicable)	\$ _____	Alimony or Child Support	\$ _____
Third mortgage (if applicable)	\$ _____	Payments for someone outside your home	\$ _____
Lot Payment (if applicable)	\$ _____	Union Dues (not payroll deducted)	\$ _____
Are real estate taxes included in your mortgage payment?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Professional Dues (not payroll deducted)	\$ _____
Taxes not included in house payment	\$ _____	Child Care Expenses	\$ _____
Is your home insurance included in your mortgage payment?	<input type="checkbox"/> YES <input type="checkbox"/> NO	Babysitter/Day Care Expenses	\$ _____
Insurance not included in house payment	\$ _____	School Expenses	\$ _____
Utilities (Normal Monthly Average)		School Lunch Expenses	\$ _____
Electricity and Gas	\$ _____	College Tuition (Not Loans)	\$ _____
Water	\$ _____	Student Loan Repayment	\$ _____
Telephone (Basic Service)	\$ _____	Newspapers, Books, Magazines	\$ _____
Trash Pick-Up	\$ _____	Personal Care Items	\$ _____
Basic Needs		Other _____	\$ _____
Home Maintenance (homeowners)	\$ _____	Other _____	\$ _____
Food (Monthly)	\$ _____	Use the space below to describe any additional monthly expenses that you must pay out of your pocket that are not covered here. Explain the type of expense, amount of expense and how long you will continue to have this expense.	
Clothing (Monthly Expense)	\$ _____	_____	
Laundry, dry cleaning, soap, etc.	\$ _____	_____	
Medical expenses <u>not</u> paid by insurance	\$ _____	_____	
Transportation		_____	
Gasoline/auto maintenance	\$ _____	_____	
Recreation, Entertainment	\$ _____	_____	
Charitable Giving (if claimed on taxes)	\$ _____	_____	
Insurance		_____	
Renters Insurance	\$ _____	_____	
Life Insurance (other than employer)	\$ _____	_____	
Health Insurance (other than employer)	\$ _____	_____	
Automobile Insurance	\$ _____	_____	
Other Insurance	\$ _____	_____	

STATEMENT OF AFFAIRS

The following pages contain extremely **IMPORTANT QUESTIONS**, many of which will be asked you again by the Trustee when you attend your first hearing. Please take your time and go through every question thoroughly and provide as much detail as possible to the questions you answer "yes" to.

List the names of all spouses (past and present) that you have been married to, as well as the dates you were married to this spouse:

Full Name (First, Middle, Last) _____

Dates Married: From _____ To _____

Full Name (First, Middle, Last) _____

Dates Married: From _____ To _____

Full Name (First, Middle, Last) _____

Dates Married: From _____ To _____

Have you ever provided a notice to any governmental unit of a Release of Hazardous Materials? ☐ YES ☐ NO

If so, list the name and address of every site for which you have provided notice to a governmental unit of a release of Hazardous Material, indicate the governmental unit to which the notice was sent and the date of the notice.

Name/Address of Site _____

Governmental Unit Notice Sent To _____

Date Notice Sent to Governmental Unit _____

Do you share ownership of any real property with another person, such as a co-tenancy or joint tenancy? (This does not apply to your spouse.) ☐ YES ☐ NO

Name of person: _____

Do you have a future interest in any real estate, such as putting money down on a property you have not purchased yet? ☐ YES ☐ NO

If so, provide details: _____

Do you own or are you buying a time-share in a vacation property or resort? ☐ YES ☐ NO

If so, provide details: _____

Do you have a car, truck, motorcycle, boat or camper in your possession titled in Someone else's name? ☐ YES ☐ NO

Year, Make, Model of Vehicle _____

Whose name is the motor vehicle titled to? _____

Address _____

City _____ State _____ Zip _____

What is this person's relationship to you? _____

Why are you holding this property? _____

STATEMENT OF AFFAIRS

Are you buying any of your furniture or appliances with installment payments?

☐ YES ☐ NO

Description of Item(s)

1. _____ Yard Sale Value _____
2. _____ Yard Sale Value _____
3. _____ Yard Sale Value _____

Name of company you make installment payments to: _____

****MAKE SURE TO LIST THESE DEBTS ON THE DEBT SHEETS.**

Are you renting-to-own any of your furniture or appliances?

☐ YES ☐ NO

Description of Item(s)

1. _____ Yard Sale Value _____
2. _____ Yard Sale Value _____
3. _____ Yard Sale Value _____

Name of company you make installment payments to: _____

****MAKE SURE TO LIST THESE DEBTS ON THE DEBT SHEETS.**

Have you gone to a loan company or bank and listed any of your furniture, appliances or personal possessions at the time you obtained the loan?

☐ YES ☐ NO

Description of Item(s)

1. _____ Yard Sale Value _____
2. _____ Yard Sale Value _____
3. _____ Yard Sale Value _____

Name of company you make installment payments to: _____

****MAKE SURE TO LIST THESE DEBTS ON THE DEBT SHEETS.**

Do you own or are you buying any tools or equipment that you use for your work?

☐ YES ☐ NO

Description of Item(s) _____

Value of the item if sold at a flea market or yard sale: _____

If making payments on, who do you pay? _____

****MAKE SURE TO LIST THESE DEBTS ON THE DEBT SHEETS.**

STATEMENT OF AFFAIRS

At present, do you have any inventory (stock in trade) that could be sold for \$200 or more in profit? ☐ YES ☐ NO

Description of Item(s) _____

Value of the item if sold at a flea market or yard sale _____

Are you buying any jewelry with installment payments?

☐ YES ☐ NO

Description of item(s)

1. _____ Yard Sale Value _____

2. _____ Yard Sale Value _____

3. _____ Yard Sale Value _____

Name of company you make installment payments to: _____

****MAKE SURE TO LIST THESE DEBTS ON THE DEBT SHEETS**

Do you have any animals, livestock or pets you could sell for \$200 or more?

☐ YES ☐ NO

Description of Animal(s) _____

Value of the animals if you had to sell them _____

Do you have any checking or savings account(s) at this time?

☐ YES ☐ NO

Name of Bank _____

Address of Branch _____

City _____ State _____ Zip _____

Type of account: Checking, Savings or Both? _____

Name(s) on the Account _____

Account Number for Checking _____ Present Balance \$ _____

Account Number for Savings (if applicable) _____ Present Balance \$ _____

STATEMENT OF AFFAIRS

Name of Second Bank (if applicable) _____

Address of Branch _____

City _____ State _____ Zip _____

Type of account: Checking, Savings or Both? _____

Name(s) on the Account _____

Account Number for Checking _____ Present Balance \$ _____

Account Number for Savings (if applicable) _____ Present Balance \$ _____

Have you closed any bank accounts within the past two (2) years?

☐ YES ☐ NO

Name of Bank _____

Address of Bank _____

City _____ State _____ Zip _____

Account Number _____ Date Closed _____ Name on Account _____

Did you owe a balance when you closed this account? ☐ YES ☐ NO Balance owed: \$ _____

If you did not owe a balance when you closed this account, how much money did you receive? \$ _____

Do you or have you rented a safe deposit box during the past two (2) years?

☐ YES ☐ NO

Name of Financial Institution _____

Address of Financial Institution _____

City _____ State _____ Zip _____

What are the contents of the safe deposit box? _____

What monthly amount do you pay for rental of this deposit box? _____

If you no longer have the safe deposit box, what date/year did you surrender it? _____

If you transferred the safe deposit box, who did you transfer it to? _____

STATEMENT OF AFFAIRS

Do you have a Christmas Club Account or any other special purpose accounts?

☐ YES ☐ NO

Name of Financial Institution _____

Address _____

City _____ State _____ Zip _____

Type of Account _____ Account Number _____

Name(s) on the Account _____ Present Balance \$ _____

Do you currently have any security deposits being held by a utility company?

☐ YES ☐ NO

Name of Utility Company _____ If yes, what is the amount? \$ _____

Address of Utility Company _____

City _____ State _____ Zip _____

Account Number _____ Present Balance \$ _____

****Remember to include any past-due utility bills that you owe from previous addresses on your Debt Sheets.**

Do you have any life insurance?

☐ YES ☐ NO

Name of Insurance Company _____

If a "Whole Life" policy, what is the current cash value? \$ _____

If your life insurance is only payable upon death, what is the face value of the policy? \$ _____

Who is the beneficiary? _____ Relationship _____

****If you have other life insurance policies, please list the information above for each one on BACK of this page.**

Do you or your spouse participate in a retirement, 401K or pension plan?

☐ YES ☐ NO

Type of pension plan (i.e., 401K, PERS, etc.) _____

When did you first enroll in this plan? _____ Current cash value \$ _____

Have you set up your own separate retirement not provided by employer?

☐ YES ☐ NO

Name of Financial Institution (if applicable) _____

Amount in this separate retirement account \$ _____ Who is the beneficiary? _____

Will you be receiving retirement benefits from a previous employer within the next six (6) months? ☐ YES ☐ NO

Date you expect to start receiving retirement benefits _____

STATEMENT OF AFFAIRS

Do you have any stocks, bonds (including savings bonds) or mutual funds?

☐ YES ☐ NO

Type of bond, stock, mutual fund _____

Does this bond, stock or mutual fund have a cash value? ☐ YES ☐ NO Cash value \$ _____

Do you have a cell phone?

☐ YES ☐ NO

Name of cell phone company _____

Address _____

City _____ State _____ Zip _____

Account Number _____ Date contract began _____

Is this a month-to-month contract? ☐ YES ☐ NO

If not, what is the length of the contract? ☐ 1 year ☐ 2 years ☐ 3 years ☐ Other _____

What is the normal monthly contract payment? (i.e., \$19.95, \$29.95, etc.) _____

Do you wish to keep the cell phone and continue paying the monthly contract? ☐ YES ☐ NO

****If you have more than one cell phone, list the same information above on the BACK of this page.**

Do you live with a roommate/relative that pays part of your expenses?

☐ YES ☐ NO

Name of roommate or relative _____ Relationship _____

What expenses do they pay? _____

What is the total amount they contribute on a monthly basis to your living expenses? _____

How long have they been paying this amount? From _____ to _____

Do relatives or other parties help to pay part or all of your monthly expenses?

☐ YES ☐ NO

Name of relatives providing additional support _____

Relationship of this relative to you _____

What is the total amount they contribute on a monthly basis to your living expenses? _____

How long have they been paying this amount? From _____ to _____

STATEMENT OF AFFAIRS

Are you currently attending college?

☐ YES ☐ NO

Name of college _____

Anticipated graduation date _____ Major _____

Do you have a student loan?

☐ YES ☐ NO

Name of institution you will make payments to _____

Address _____

City _____ State _____ Zip _____

Date student loan first obtained? _____ Date payment is/was to begin _____

Total amount to pay off student loan \$ _____ Average monthly payment \$ _____

Do you currently owe any fines? (includes parking tickets, moving violations, etc.)

☐ YES ☐ NO

Name of court you owe fines to _____

Address _____

City _____ State _____ Zip _____

Date of occurrence _____ Amount owed \$ _____

Case number assigned by court _____ Name of party ☐ Husband ☐ Wife ☐ Other

What was this fine for? _____

If you pay child support, are you currently behind in any payments?

☐ YES ☐ NO

Name of person/agency you pay child support to _____

Address _____

City _____ State _____ Zip _____

What is the total amount you owe in back child support? _____

What date (or year) were you supposed to start paying child support? _____

What are the payment arrangements? _____

STATEMENT OF AFFAIRS

Even if you never expect to collect any money, does an ex-spouse owe you money for alimony or child support?

☐ YES ☐ NO

Name of Ex-Spouse _____

Address of Ex-Spouse _____

City _____ State _____ Zip _____

Total amount he/she owes you \$ _____ Date originally started owing you _____

Has this ex-spouse been court-ordered to pay you? _____ Year of court order? _____

Over the last year, have you, your children or your spouse been involved in an accident Where someone was hurt, for example, a car accident?

☐ YES ☐ NO

Date accident occurred _____ Who was at fault? _____

Who was involved in the accident? _____

Was any insurance money received? ☐ YES ☐ NO If yes, how much? _____

During the next six (6) months, do you expect to inherit anything?

☐ YES ☐ NO

How much do you expect to inherit? \$ _____ Date expected _____

Reasons for inheritance _____

During the next six (6) months, do you expect to recover on anyone's life insurance policy?

☐ YES ☐ NO

How much do you expect to receive? _____ Date expected _____

Reasons for receiving this money _____

Do you expect to receive any money from any insurance claim, for any reason, during the Next six (6) months?

☐ YES ☐ NO

How much do you expect to receive? _____ Date expected _____

Reasons for receiving this money _____

Are you the beneficiary of a trust fund?

☐ YES ☐ NO

What is the amount of the trust fund? \$ _____ Name of trust fund owner _____

Relationship to you _____ When will you have access to this trust fund? _____

STATEMENT OF AFFAIRS

Are you owed any back wages, commissions, or vacation pay from your current or previous employer?

☐ YES ☐ NO

Employer Name _____

Amount expected to receive \$ _____ Date expected to receive _____

****Provide details about this amount owed you. (Feel free to use the back of this page if necessary)**

Is any of your property in the hands of a repairman, storage company or pawnbroker?

☐ YES ☐ NO

Name of Place Holding Your Property _____

Address _____

City _____ State _____ Zip _____

Description of items and yard sale value:

1. _____ Yard Sale Value \$ _____

2. _____ Yard Sale Value \$ _____

3. _____ Yard Sale Value \$ _____

What is the total amount you need to pay in order to get these items released? _____

In the near future, do you expect to settle, win or begin a case for personal injury?

☐ YES ☐ NO

How much do you expect to receive? \$ _____ Date you expect to receive this money? _____

Provide details about this personal injury claim _____

Name of attorney or law firm handling this claim _____

In the near future, do you expect to enter into any property settlement with a former spouse?

☐ YES ☐ NO

List all items you expect to receive or turn over in the property settlement (including cash) _____

What is the total market value (yard sale value) of these items? \$ _____

When do you expect to receive this money or property? or _____

When do you expect to turn over this cash or property? _____

STATEMENT OF AFFAIRS

Does anyone owe you any money for a judgment you have obtained against them?

☐ YES ☐ NO

Name of party you filed a lawsuit on _____

Address _____

City _____ State _____ Zip _____

Date you filed this lawsuit? _____ Money amount awarded you in judgment \$ _____

Even if you never expect to collect, does anyone owe you any money for any reason whatsoever? ☐ YES ☐ NO

Name of Person who owes you money _____

Address _____

City _____ State _____ Zip _____

Explain why they owe you money _____

Amount they owe you \$ _____ Date they originally started owing you _____

Have you made any payments on your loans or bills other than ordinary payments? In other Words, have you made catch-up payments, paid off or borrowed to pay on or off bills or loans? ☐ YES ☐ NO

Name of Creditor You Paid _____

Date Paid _____ Amount Paid \$ _____ Current Balance Due _____

Name of Creditor You Paid _____

Date Paid _____ Amount Paid _____ Current Balance Due _____

Are there any lawsuits pending against you now?

☐ YES ☐ NO

Name of party suing you (Plaintiff) _____

Case Number _____ Date Lawsuit Filed _____

Type of Lawsuit From Court Pleading (Complaint, Summons, etc.) _____

Attorney for the Plaintiff (found on court pleading) _____

Address _____

City _____ State _____ Zip _____

Court when lawsuit was filed (at the top of the pleading) _____

Address _____

City _____ State _____ Zip _____

****If lawsuit is LESS THAN 1 YEAR OLD, please make a copy and include with these forms.**

STATEMENT OF AFFAIRS

Have your wages or property been garnished or attached?

☐ YES ☐ NO

Who garnisheed your wages or attached your property? _____

When did they repossess? (If car, provide the year, make, model) _____

How much money do they take from your paycheck? \$ _____ How often is this deducted? _____

Have you returned any property to creditors or was any of your property repossessed from you, sold at foreclosure, transferred through a deed or returned to a seller?

☐ YES ☐ NO

What property did you turn over to a receiver? _____

When and where did this take place? _____

Is any of your property in receivership or other legal custody?

☐ YES ☐ NO

When did you file your receivership? _____

In what court was this done? _____

Have you made any gifts to friends or relatives?

☐ YES ☐ NO

What gifts or transfers have you made? _____

Who did you give the gift to?

What date/year did you make the gift? _____ What is the approximate value? \$ _____

Have you transferred any money or property to family members or friends or paid them any Money on debts you might owe them?

☐ YES ☐ NO

Type of property transferred: _____

What date/year was it transferred? _____ What is the approximate value? \$ _____

Have you had any unusual losses, such as fire, theft, gambling or otherwise?

☐ YES ☐ NO

Type of loss? ☐ Fire ☐ Theft ☐ Gambling ☐ Other _____

What item(s) or amount of money was lost? _____

What date/year was it lost? _____ Amount insurance paid? \$ _____

Have you had any losses covered by insurance?

☐ YES ☐ NO

Describe loss _____

Date/year of loss? _____ Amount insurance paid? \$ _____

STATEMENT OF AFFAIRS

Have you consulted with any other attorney about your financial affairs or paid money to a debt counseling service?

☐ YES ☐ NO

Name of attorney or service _____

Address _____

City _____ State _____ Zip _____

Consultation Date _____ Total paid for service \$ _____

Have you filed any bankruptcy within the last eight (8) years?

☐ YES ☐ NO

Did you file a Chapter 7, Chapter 13, or a Chapter 11? _____

Date your bankruptcy was filed? _____ City/State Filed? _____

Name(s) of persons who filed? _____

Was the case discharged? ☐ YES ☐ NO Case Number _____

Is anyone holding any property that belongs to you?

☐ YES ☐ NO

Item(s) in someone else's possession that belong to you? _____

Name of person holding these items _____

Address _____

City _____ State _____ Zip _____

Beside your current address, have you lived at any other addresses within the past six (6) years? ☐ YES ☐ NO

Previous residence _____

City _____ State _____ Zip _____

Time period lived at this address: From (date/year) _____ To (date/year) _____

Name(s) of parties who lived at this address _____

Previous residence _____

City _____ State _____ Zip _____

Time period lived at this address: From (date/year) _____ To (date/year) _____

Name(s) of parties who lived at this address _____

STATEMENT OF AFFAIRS

Previous residence _____

City _____ State _____ Zip _____

Time period lived at this address: From (date/year) _____ To (date/year) _____

Name(s) of parties who lived at this address _____

Have you been self-employed or had any financial interest in any business (or been involved in a partnership with someone who owned a business) within the past eight (8) years?

☐ YES ☐ NO

Name of business _____

Business address _____

Type of business (what type of products were sold)? _____

Date business began _____ Date business ended _____

Name of your partners, co-investors, or associates? _____

What were your net profits for this year? \$ _____ Last year? \$ _____ 2 Yrs. Ago? \$ _____

How much income tax do you pay from the income you make with your business? \$ _____

During the past two (2) years, have either you or your spouse had any other income source outside normal pay from your employer? (includes flea market dealers)

☐ YES ☐ NO

Income this year? \$ _____ Last year? \$ _____ 2 Yrs Ago? \$ _____

What is the amount of the TAX REFUND you received this year? \$ _____

☐ I did not file taxes

☐ I had to pay taxes and did not receive a refund

List payments made to any creditor totaling more than \$600.00 during the last 90 days.

Creditors (Name and Address)	Dates of Payments	Amount Paid	Amount Still Owing

STATEMENT OF AFFAIRS

List payments made to insider creditors during the last year.

Creditors (Name and Address)	Dates of Payments	Amount Paid	Amount Still Owing

Were you sued or did you sue anybody last year (12 months)? _____

If yes, list the following on back of this sheet: caption of suit, case number, nature of proceeding, court and location, status/disposition.

By signing below, I state that all the information provided in the Client Intake forms are true, accurate and complete to the best of my (our) knowledge.

Signature of Debtor #1

Signature of Debtor #2

Date: _____

Date: _____