

## BANKRUPTCY QUESTIONNAIRE

**Who Are You?** Write, check or circle your answers. If you are not sure or do not know exactly, give your best estimate & mark the section with a question mark. The attorney will go over your answers during your consultation.

Your full name.	I was referred by:	
	Friend	Newspaper
	Internet site	Yellow Pages

Social Security #	Home Phone #
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Email address	Cell Phone #
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Any other name(s) used in the past 6 years <i>(such as a maiden name)</i>	Work or Other Phone #
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Home address

Mailing address  
*(if different from home address)*

Prior address(es) during the last 3 years? (Include dates for each)

Your employer?	Your job?
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When did you start with Employer?	Prior Bankruptcy/Chapter 13 <i>(if yes, when)</i>
	No      Yes      When?

Is your Paycheck usually the same?	Yes	No	My pay period is	
			Every week	Every 2 weeks

Other than by Working, I get money from...	2X month	1X month
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Alimony/Child Support	Social Security	Unemployment	Other <i>(specify)</i>
Dividends	Disability	Rental Income	
Investments	Pension	Family or Friends	

Amount of Alimony, Child Support, Pension, or Rent I <b>receive</b> each month.      \$	Amount of Social Security \$ or other income I <b>receive</b> .
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**What was your gross income (before taxes taken out) during the past 3 years?**  
*Do not include income from your spouse - see next page*

2010 Wages      \$	Other Income <i>(specify source)</i> \$
<i>(Total earned to the present)</i>	<b>2010</b> Total received to the present
2009 Wages - total      \$	<b>2009</b> \$
2008 Wages - total      \$	<b>2008</b> \$

When your papers are completed and ready for you to review and sign, would you like us to:

Mail them	Call to come in	Email Adobe PDF file
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**Spouse's Information (if applicable)**

Spouse's full name.

Social Security #

Home Phone #

Email address

Cell Phone #

Any other name(s) used in the past 6 years *(such as a maiden name)*

Work or Other Phone #

Home address

Mailing address  
*(if different from home address)*

Any prior address(es) during the last 3 years? *(Include dates for each)*

Who is your employer?

What is your job?

When did you start with this employer?

Prior Bankruptcy/Chapter 13 *(if yes, when)*  
No Yes When?

Is your Paycheck the same or mostly the same every time? Yes No

My pay period is  
Every week Every 2 weeks

Other than by Working, I get money from...

2X month 1X month

Alimony/Child Support  
Dividends  
Investments

Social Security  
Disability  
Pension

Unemployment  
Rental Income  
Family or Friends  
Other *(specify)*

Monthly Alimony, Child Support, Pension, Rent I receive.

\$

Monthly Social Security \$ or other income I receive.

**What was your gross income (before taxes were taken out) during the past 3 years?**

*Do not include income from your spouse, see previous page.*

**2010** Wages \$  
*(Total earned to the present)*

**Other Income (specify source)** \$  
**2010** *Total received to the present*

**2009** Wages - total \$

**2009** \$

**2008** Wages - total \$

**2008** \$

## Credit History & Issues (*check any that apply*)

### ***Right Now***

My wages are being garnished.

I am behind on my house payments. *Estimate # of months behind.*

I owe money to the IRS or owe other taxes. *For which years?*

I owe delinquent child support or alimony.

I have one or more checks out for a Payday loan.

I have possession of property that belongs to someone else.

I expect to get money or property from a trust, gift, inheritance, or insurance claim in the next 6 months.

I share living expenses with someone other than a family member.

I have a credit card, mortgage, loan or owe money to my bank or institution where I have a deposit account (such as a checking or savings account).

I usually keep more than \$1,000 in my bank account (whether checking or savings).

### ***At some time in the past***

I gave false information when I applied for credit (*such as amount of income or other debts*).

I moved and left no forwarding address.

Someone co-signed a debt for me, I co-signed for someone, or I took out debt to help someone.

I was paid for property I did not deliver or work I did not complete.

### ***During the last 90 days only, I/We -***

**Paid a single creditor \$600 or more, whether in one payment or spread out in payments. (*With a monthly payment of at least \$200/month, such as for a mortgage/car payment*).**

My/our bank has taken money out of my/our account for a debt *without permission*.

I/We obtained or used credit (*charge card, loan, etc*) to buy more than \$250.00 or to get cash

### ***During the last 6 months only, I/We***

Assigned property to a creditor or gave property to a receiver (*not garnishment*).

### ***During the last 24 months, I/We***

Repaid a loan/debt owed to friends or relatives.

**Was sued by a creditor. (*Provide copies of the paperwork.*)**

**Had my wages garnished or bank account attached (*Provide copies of paperwork.*)**

**Was charged with or tried for a crime. (*Provide copies of the paperwork.*)**

Had a loss that could be covered by an insurance claim.

Had an injury, dispute, or loss requiring legal action. (*Such as injury, property damage*)

**Lost property by foreclosure, repossession or voluntarily return.**

Gave a gift valued at more than \$200.00 or donated more than \$100.00 *in cash* to charity.

Lost money or property by gambling, fire, or theft.

Paid for debt/credit counseling or bankruptcy services.

Sold, gave away, or put up title to property (*such as a car or home*) to get a loan.

Sold or gave away title to real estate (such as a home).

Sold or gave away title to a vehicle, shares of stock, investments, or any other property.

Closed a bank account. (*Provide name of bank, date closed, account # & last balance.*)

Have or had a safe deposit box or storage unit.

Gave a creditor title to or possession of property, traded property to settle a debt or left property with a pawnbroker, repairman, or in storage.

### ***Within the last 8 years***

I was married to someone *else* or I will be filing Bankruptcy without my current spouse.

I am or was self employed, had my own business or was in business with others.

**Things I/We Own** *Be as complete as possible! Do not leave ANYTHING OUT!*

**REAL ESTATE**

Home/Residence  
Timeshare or vacation property  
Other Real Estate/ Mobile Home

**Apparel**

Clothing  
Furs

**ART, BOOKS & COLLECTIBLES**

Bibles & other Books  
Collections (coins, stamps, sports)  
Art objects (paintings, sculpture)

**JEWELRY**

Engagement/Wedding ring  
Other gold jewelry  
Watches

**FINANCIAL ACCOUNTS**

Bank/Credit Union Accounts

**HOUSEHOLD ITEMS**

Antiques  
Appliances  
Dishes  
Furniture  
Home computer  
Lawn mower  
Patio/Outdoor furniture  
Sewing machine  
Stereo  
Televisions  
Vacuum cleaner  
Video equipment/Cameras  
Tools

**HOBBY EQUIPMENT**

Bicycle, Exercise machine  
Guns  
Musical instruments  
Weapons (swords, knives)

**VEHICLES**

Car/Truck/SUV  
Motorcycle/scooter/mini-bike

**RETIREMENT BENEFITS**

IRA/ 401K / 403B  
Union pension  
Rollover account/Other retirement

**OTHER PROPERTY RIGHTS**

**SECURITY DEPOSITS**

Electric/Gas Company  
Water Company  
Landlord  
Phone Co Including Cell Phone  
Cable Company

**INVESTMENTS**

Stock/Bonds/Businesses Owned  
Partnership Interests

**MISCELLANEOUS PROPERTY**

Aircraft/Boats/Helicopter  
Business Equipment  
Farm Ownership  
Commercial Vehicle  
Disability Equipment  
Life Insurance Proceeds  
Patents, Copyrights, etc  
Pending Lawsuit  
Prof License other License  
RV/Travel Trailer  
Tax Refund owed you  
Trust or Inheritance  
Whole/Universal Life

**MONEY OWED TO YOU**

Accounts Receivable  
Alimony/Child Support  
Unpaid Commissions Earned  
Divorce Decree Property  
Disability Benefits

*Bank name(s) & account type (checking, savings)*

*Landlord name & copy of rental agreement*

*Mortgage - Interest rate, term & intention.*

*Car loan(s) Interest rate, term & intention.*

*Appliance, Furniture, or Electronic purchases - Interest rate, term & intention.*

**Budget - Expenses** - List your typical living expenses (if amount varies, use an average)

Marital Status <i>Check One</i>	Single, Never Married Divorced as of	Married and Living together Married and Living apart Widowed
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List anyone living with you *if you are paying some or all of their expenses.*

Full Name	Age	Relationship
	years	
	years	
	years	
	years	

**Monthly Living Expenses** Estimate your average monthly living expenses. If your expenses this month are unusually high or low, put down a typical amount. If you & your spouse are separated, he/she should complete a separate copy of this page. *If you have other expenses not on this form, put them down too!*

Rent, 1 <sup>st</sup> mortgage, or mobile-home lot rent	\$		
2 <sup>nd</sup> or 3 <sup>rd</sup> Mortgage <i>not included above</i>	\$	Homeowners Dues	\$
Property taxes & insurance <i>not included in mortgage payments</i>	\$	Home repairs, upkeep	\$
Power & natural gas	\$	Trash, Water & sewer	\$
Cell Phone	\$	Regular phone	\$
Internet service	\$	Cable tv/satellite service	\$
Other utilities: ( <i>Describe</i> )	\$	Bank service charges	\$
Food/Groceries	\$	Clothes	\$
Laundry, dry cleaning	\$	Medical & dental expenses	\$
Bus or cab fare	\$	Gas, oil, repairs ( <i>exclude loan pmts</i> )	\$
Vehicle payment 1	\$	Vehicle payment 2	\$
Vehicle Insurance	\$	Life Insurance ( <i>not by pay deduction</i> )	\$
Child Care/School Expenses	\$	Alimony/Child support you pay	\$
Pet care	\$	Barber/Hairdresser/Manicurist	\$
Charitable contributions	\$	Storage Unit	\$
Cigarettes/Tobacco	\$	Student loans	\$
Security System	\$	Other expenses: <i>Describe</i>	\$
Other installment payment: ( <i>furniture, jewelry, electronics, appliances</i> ) <i>Describe</i>			\$
Recreation, clubs, entertainment, newspapers, magazines			\$
Homeowner's or renter's Insurance premiums ( <i>not included in mortgage pmt</i> )			\$
Health Insurance premiums ( <i>not deducted from wages</i> )			\$
Taxes ( <i>not deducted from wages or included in home mortgage</i> ) <i>Describe</i>			\$
Payments to support dependents not living with you			\$