

SECTION A-PERSONAL INFORMATION

Name:(include middle) _____ Social Security _____

Street Address: _____
Street City Zip

Mailing Address: (if different) _____

Email: _____ Phone: _____ Work Phone: _____

Spouse's Name: _____ Social Security# _____

Street Address: _____
Street City Zip

Mailing Address: (if different) _____

Email: _____ Phone: _____ Work Phone: _____

Other names in last 8 years?: No Yes
(list) _____

Business names used in last 8 years?: No Yes (list) _____

Prior Bankruptcy in last 8 years? No Yes (list)

City Case Number Date filed

SECTION B - REAL PROPERTY

Do you or your spouse own or have an interest in a residence, building, land, timeshare or similar property? No Yes

Address _____

Type Single Family Duplex Condo Mobile home Bare land Timeshare Rental Other

Current Value: _____ Source of Value: _____

1st Mortgage: _____
Company name Address State Zip

Account Number: _____ Balance owed on 1st Mortgage \$ _____

Are there any past due payments? No Yes If yes, How many? _____

2nd Mortgage: _____
Company name Address State Zip

Account Number: _____ Balance owed on 2nd Mortgage \$ _____

Are there any past due payments? No Yes If yes, How many? _____

Do you or your spouse own or have an interest in any other residence, condo, building, mobile home, land, timeshare or similar property? No Yes. If yes, please attach an additional page with the information requested above.

Have you invested money in property owned by someone else or helped someone else buy a residence, building, land, timeshare or similar property even if your name is not on the title? No Yes If yes, please describe below.

SECTION C – PERSONAL PROPERTY

Each question has a box to mark **No** or **Yes** . The recently updated official bankruptcy forms now require a yes or no answer to each question. If you mark Yes to any question, please provide details in the space below each question.

1. Do you own, lease, or have an interest in any **vehicles** even if they are not titled in your name? No Yes

Make (Ford, Chevy)	Model (F150, Accord))	Year	Mileage	Value
Make (Ford, Chevy)	Model (F150, Accord))	Year	Mileage	Value
Make (Ford, Chevy)	Model (F150, Accord))	Year	Mileage	Value
Make (Ford, Chevy)	Model (F150, Accord))	Year	Mileage	Value

2. Do you own or have an interest in any watercraft, aircraft, motor homes, ATV's or other recreation vehicles even if they are not titled in your name? No Yes

3. Household goods and furniture No Yes

Furniture \$ _____ Appliances \$ _____ Household goods \$ _____

4. **Electronics** No Yes TV's \$ _____ Audio/video/stereo \$ _____

Computer/printer/scanner \$ _____ Cell Phones \$ _____

Music Collection \$ _____ Cameras \$ _____

Other(describe) _____ \$ _____ Other(describe) _____ \$ _____

5. **Collectibles of value:** No Yes (antiques, figurines, painting, prints or other artwork, nooks, pictures or other art objects, stamp, coin, sports card collections, other collections, memorabilia, collectibles) Please list each that applies and a dollar value.

_____ \$ _____	_____ \$ _____
Description	
_____ \$ _____	_____ \$ _____

6. **Sports and Hobby Equipment** No Yes (Sports, photographic, exercise, camping and fishing gear, bicycles, pool tables, golf clubs, canoes and kayaks, carpentry tools, musical instruments and other hobby equipment) List below.

_____ \$ _____	_____ \$ _____
Description	
_____ \$ _____	_____ \$ _____

7. **Firearms** No Yes (pistols, rifles, shotguns, ammunition, reloading equipment and related equipment)

_____ \$ _____	_____ \$ _____
Description	

8. Clothing, shoes and accessories: No Yes Clothing and shoes \$ _____ Accessories \$ _____

8. Jewelry No Yes (everyday jewelry, costume jewelry, rings, heirlooms, watches gems, gold, silver)

_____ \$ _____	_____ \$ _____
Description _____	_____
_____ \$ _____	_____ \$ _____

9. Non Farm Animals No Yes (dogs, cats, birds, horses)

_____	Value, if any _____	_____	Value, if any _____
Describe		Describe	

10 Any other personal property. No Yes (this could include health aids, yard tools, power tools)

11 Bank and other deposit account: No Yes (checking, savings, Paypal, Payroll cards, debit cards, CD's, credit unions, brokerage houses and similar institutions) If you need additional room please attach a separate sheet.

Checking _____	Last 4 Digits of Account _____
Checking _____	Last 4 Digits of Account _____
Checking _____	Last 4 Digits of Account _____
Savings _____	Last 4 Digits of Account _____
Savings _____	Last 4 Digits of Account _____
Other _____	Last 4 Digits of Account _____
Other _____	Last 4 Digits of Account _____

12. Bonds, Mutual Funds and publicly traded stocks: No Yes. If Yes, list below

13. Non publicly traded stock and interest in businesses No Yes (This includes and LLC, joint venture, partnership S Corporation or C corporation)

14 Government and Corporate Bonds and other negotiable and non-negotiable instruments. No Yes (personal checks, cashier's checks, promissory notes, money orders) If yes, list below.

15. Retirement and pension accounts. No Yes (IRA's, 401K's 403b, TSP, Keogh, ERISA accounts, profit sharing pensions) If yes list below.

16 Security deposits and payments No Yes (deposits with landlord, utility company prepaid rent, If yes list below:

17. Annuities No Yes (a contract for a periodic payment of money to you either for life or for a number of years) If yes

18 Education IRA, Qualified ABLE program state tuition program No Yes . If yes list below

19. Trusts, equitable or future interest in property and rights or powers exercisable for your benefit No Yes If yes, list below.

20. Parents copyrights, trademarks, trade secrets, and other intellectual property No Yes . If yes please describe below.

21. Licenses, franchises and other intangibles. No Yes (building permits, exclusive licenses, cooperative association holdings, liquor licenses, professional licenses)

22. Tax refunds owed to you. No Yes (if yes list below. Include what you expect to receive this current year and next.

22(a) Have you filed all tax returns that are due? No Yes . If not, what years are not filed?

23. Family Support No Yes (past due or lump sum alimony, spousal; support, child support maintenance, divorce settlement, property settlement. How much is owed?)

24. Other amounts someone or a company owes to you No Yes (unpaid wages, disability insurance payments, disability benefits, sick pay, vacation pay, worker's compensation social security benefits, unpaid loans)

25. Interest in insurance policies. No Yes If yes, list name of company and any cash surrender value (health, disability, life insurance, health savings accounts (HSA), credit, homeowners or renters insurance)

Company	Beneficiary, if any	Surrender or refund value
Company	Beneficiary, if any	Surrender or refund value
Company	Beneficiary, if any	Surrender or refund value

26. Any interest in property that is due you from someone that has dies No Yes (if you are the beneficiary of a living trust, expect proceeds from a life insurance policy, or are currently entitled to receive property because someone has died)

26(a). Do you expect to receive any kind of inheritance within the next year? No Yes If yes, please explain.

27. Claims against third parties even if you have not filed a lawsuit or made a demand for payment. No Yes (accidents, employment disputes, wage claims, insurance claims, or rights to sue). If yes, describe below.

28. Other contingent and liquidated claims of every nature, including counter claims of the debtor and rights to set off claims) No Yes (If yes, describe below.

29. Any **financial** assets you did not already list above No Yes If yes, describe below.

30. Do you own or have a legal or equitable interest in any business related property No Yes If yes then complete questions 31-37

31. Account receivables or commissions you have already earned by have not yet been paid for No Yes. If yes, describe below.

32. Office equipment, furnishings and supplies No Yes (computers, modems, printers, copiers, fax machines, rugs telephones, desks, chairs, electronic devices) If yes, describe below.

33. Machinery, fixtures, equipment, supplies you use in a business., and tools of your trade No Yes . If yes, describe below.

34. Inventory No Yes. If yes, describe below.

35. Interests in partnerships or joint ventures. No Yes. If yes, describe below

36. Customer lists, mailing lists and other compilations No Yes. If yes, describe below.

37. Any other business-related property you did not list already No Yes If yes, describe below.

38. Do you have any legal or equitable interest in any farm or commercial fishing related property No Yes. If yes, describe below

39. Farm animals No Yes. If yes, describe below.

40. Crops No Yes. If yes, describe below.

41. Farm and fishing equipment, implements, machinery, fixtures and tools of trade No Yes. If yes, describe below.

42. Farm and fishing supplies, chemicals and feed No Yes. If yes, describe below

43. Any farm and commercial fishing related property you did not already list No Yes If yes, describe below.

44.. Any property of any kind you did not already list above No Yes (for example season tickets, country club membership, Groupons, gift certificates or anything else you can think of that is not listed above). If yes, describe below.

SECTION D - CREDITORS

Car, Truck, ATV, Motorcycle and RV Loans	Describe Vehicle	Amount owed and value	Cosigner name and address
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____		\$ _____ Amount Owed \$ _____ Value	
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____		\$ _____ Amount Owed \$ _____ Value	
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____		\$ _____ Amount Owed \$ _____ Value	
Furniture, Jewelry and other installment loans	Describe the property	Amount owed and value	Cosigner name and address
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____		\$ _____ Amount Owed \$ _____ Value	
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____		\$ _____ Amount Owed \$ _____ Value	

**Credit cards, medical bills, collections, past due utilities,
loans from family and friends and all other debts of any kind.**

Creditor name, address and account number	Type of debt	Amount owed	Cosigner name and address, if any.
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			

CONTINUED LIST OF UNSECURED CREDITORS

Creditor Name, Address & Account number	Type of debt	Amount owed	Co debtor Name & address
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____ Account Number _____			

Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			
Account Number _____ Name _____ Address _____ City _____ State _____ Zip _____			

TAX DEBTS

Federal Taxes	amount owed	When Return Filed/Comments
Year _____	_____	_____
Year _____	_____	_____
Year _____	_____	_____
Year _____	_____	_____
State Taxes		
Year _____	_____	_____
Year _____	_____	_____
Year _____	_____	_____
Year _____	_____	_____

Section E

Income and Expenses

Client 1

Client 2 (or non filing spouse)

Occupation Title _____

How Long Employed _____

Employer's Name _____

& Address _____

Hourly Rate _____

Average hours worked
per week _____

Gross monthly Income
from employment _____

Overtime _____

Deductions

a. Tax & S.S. _____

b. Union Dues _____

c. Insurance _____

d. Other _____

Describe _____

OTHER INCOME:

Business Income _____

Real Property Income _____

Interest & Dividends _____

Alimony/child support _____

Social Security _____

Unemployment _____

Pension/Retirement _____

Other _____

Specify source of other income

Do you anticipate an increase or decrease in income in the next year? If yes, explain below

AVERAGE MONTHLY EXPENSES

Rent or First Mortgage		
Real Estate Taxes (if not included)		
Homeowner or renter's insurance		
Home maintenance, repair and upkeep		
HOA or Condominium dues		
Second mortgage or home equity loan		
Electricity, heat and natural gas		
Water, sewer and garbage		
Phone, cell phone, cable, internet, satellite		
Other Utilities _____		
Food and housekeeping supplies		
Child care and children's education costs		
Clothing, laundry and dry cleaning		
Personal care products and services		
Medical and dental expenses		
Transportation (gas, repairs, tires)		
Bus and train		
Entertainment, clubs recreation - newspapers, magazines, etc.		
Charitable Contributions and tithing		
Life Insurance		
Health Insurance		(not deducted from paycheck)
Auto Insurance		
Other Insurance ? _____		
Car Payment		Which car? _____
2 nd car payment		Which car? _____
Other Installment Payments		Describe _____
Alimony/spousal support		
Child support		
Support for others not living with you		Describe _____
Bank charges/fees		
School lunches		
Pet food and veterinary care		
School sport and activity fees		
Other _____		

Do you expect any changes in your expenses over the next year? Yes ____ No ____ . If yes, please explain what changes will occur.

Section F

Misc. Information

1. Current Marital Status Married Not Married

2. In the last three years have you lived any anywhere other than where you live now? No Yes
Address _____ Dates resided there _____

3. Within the last 8 years did you ever live with a spouse or legal equivalent in a community property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington and Wisconsin) No Yes

4. Did you earn income from employment or operation a business in the 2022, 2023 or 2024? No Yes If yes, please provide W-2 forms and tax returns for the years 2021 and 2022. For 2023 please provide year to date pay stubs for all jobs.

5. Any other sources of income in 2022, 2023 and 2024 even if it is not taxable. No Yes (includes child support, alimony, social security, unemployment public benefits, food stamps, pensions, rental income dividends, gambling, lottery, babysitting, eBay sales)

2022	Source of income _____	Amount \$ _____
2022	Source of Income _____	Amount \$ _____
2023	Source of income _____	Amount \$ _____
2023	Source of Income _____	Amount \$ _____
2024	Source of Income _____	Amount \$ _____
2024	Source of Income _____	Amount \$ _____

6. Are you debts primarily consumer debts incurred primarily for personal, family or household purposes No Yes

6(a). In the last 90 days did you pay one single creditor at total of \$600 or more. No Yes (For example a house payment or a car payment of \$200 per month or more or a balance transfer from one credit card to another)

Creditor Name	Date and \$ paid	Date and \$ Paid	Date and \$ Paid
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7. Within the last year did you pay back any Insiders? No Yes (insiders are friends, family members, business associates, partners. This would also include child support and spousal support) If yes, describe below.

8 Within the last year did you make any payments on a debt or transfer property that benefited an insider? No Yes (this could include paying a debt that has a cosigner, paying a credit card that someone let you use but that your name is not on)

Name of person	Date of payments	Total amount Paid	Amount still owed	Reason for payment
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9. Were you a party to a lawsuit, court action or administrative proceeding in the last year No Yes

Case Title and Account #	Nature of the case	Court location	Status of case
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10. Has you have anything repossessed, garnished, attached, foreclosed, seized or levied No Yes

Name of creditor	Describe property	What happened	Date	Value
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11. In the last 90 days did a creditor set off any amounts owed to you. No Yes (The IRS or state keeping your tax refund or a bank taking money out of your account or Social Security holding benefits) If yes describe what happened below.

12 In the last year has any of your property been in the possession of an assignee for the benefit of creditors, court appointed receiver a custodian or other official No Yes If yes describe what happened below.

13. In the last two years did you give any gifts with a total value of more than \$600 to any person? No Yes If yes give name and address of the person, the type of gift and the dollar value.

14. In the last 2 years did you make any charitable contribution or gifts with a total value of \$600 to any charity. No Yes (this would include churches, non profits, Goodwill, other charities.) If yes, give the name and address of the charity or church and value of the gift or donation)

Name of Charity or Church	Amount paid	dates of payments
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15. In the last year have you lost anything due to fire, theft, other disaster, or gambling? No Yes. If yes, explain below.

16. Did you or anyone acting for you consult with anyone in the last year about bankruptcy or to prepare a bankruptcy petition or documents No Yes If yes, list below. If you paid them any money or gave them other property, indicate when and how much.

17. In the last year did you or anyone acting for you transfer money or property to anyone who promised to help you deal with your creditors or to make payments to your creditors No Yes (this could include debt settlement companies, tax resolution companies, attorneys, credit counseling companies) If yes, list below

18. In the last 4 years have you sold, traded, given away, or otherwise transferred anything to anyone other than in the ordinary course of a business No Yes (this could include selling a house, trading in a car, selling on eBay, selling on craigslist or garage sales). If yes describe below.

Name and address of recipient Relation to you	What was sold or transferred	Value received	When
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19. Within the last 10 years did you did you transfer any property to self settled trust or similar devise of which you are a beneficiary No Yes **If yes describe below.**

20. In the last year were any financial accounts or instruments held in your name or for your benefit closed, sold, moved or transferred or did you remove your name from a joint account? No Yes (accounts can include checking savings, money market, CD's shares in banks, credit unions brokerage houses, pension funds, cooperatives, or any other financial institutions)

Name of Institution	Last 4 Digits of Acct #	Type of Account	Date	Last balance
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21. In the last year have you had a safe deposit box or any other place to deposit valuables, securities, cash, etc No Yes

Name of Institution	Who else had access	Describe contents	Do you still have it
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22. Have you stored property in a storage until or any other place other than your home in the last year? No Yes. **If yes, please provide facility name and address.**

23. Do you hold or control any property someone else owns, No Yes (borrowed property, storing something for someone, holding something in trust for someone. Holding something for safekeeping)

Owner name and address	Where is the property	Describe property	Value
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Environmental Information definitions: Environmental law means any federal, state or local statute, or regulation concerning pollution, contamination, release of hazardous or toxic substances, wastes or material into the air, land, soil, surface water, ground water, or any other medium, including statutes or regulations controlling the cleanup of these substances, wastes, or material. Site means any location, facility or property as defined under any environmental law, whether you now own, operate, or

utilize it or used to own, operate or utilize it, including disposal sites. Hazardous material means anything an environmental law defines as a hazardous waste, hazardous substance, toxic substance, hazardous material, pollutant, contaminant, or similar term.

24. Has any governmental unit notified you that you may be liable or potentially liable under or in violation of an environmental law. No Yes

25. Have you notified any governmental unit of any release of hazardous material? No Yes

26. Have you been a party in any judicial or administrative proceeding under any environmental law? Include settlements and orders. No Yes

27. Have you operated or been connected to a business in the last four years as a (mark each that apply) Sole proprietor, LLC or LLP, Partnership, Owner of at least 5% of the voting or equity shares of a corporation, officer, director, or managing executive of a corporation No Connection to any business.

Name of Business Nature of Business Accountant Employer ID # Dates existed

28. In the last 2 years did you give a financial statement to anyone about your business including financial institutions, creditors or other parties No Yes

29. Do you have any dependents? No Yes If yes, please provide relationship to you and their ages.

Please note that I must have an opportunity to review this completed questionnaire and perform a conflict of interest check before I can agree to represent you in your bankruptcy case. Also we both must sign a written fee agreement as required by the bankruptcy code. You also acknowledge that the information contained in this worksheet that you provided is true and accurate to the best of your knowledge.

Signature

Date

Signature

Date

LIST OF NECESSARY DOCUMENTS TO BRING WITH YOU WHEN YOU DROP OFF THIS WORKSHEET

1. Last 7 months of pay stubs or other proof of income for each person.
2. 2022 and 2023 tax returns (if completed) and W2 forms.
3. Bank statements for last 7 months.
4. Most recent property tax statement if you own a house or land.
5. Copy of vehicle registration or copy of title for all vehicles.
6. 401K, 403(b), pension plan or IRA statement showing balance in each account.
7. Copy of any divorce decree or property settlement agreement within last 5 years.
8. Copy of most recent statement for each creditor and/or collection agency, if available.
9. Copy of credit counseling certificate. WWW.moneysharp.org is an effective low cost option. The cost is \$10.00.
10. Copy of driver's license or ID card and Social Security card or a W2 form with your full number on it.

**** If you are returning your documents electronically through email, fax or upload, you will need to contact me to arrange a telephone meeting to review the documents before I can start working on your file.****