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PERSONAL BANKRUPTCY WORKSHEET

All information being requested is pertinent. Please complete each line. State "n/a" where applicable.

First Name _____ **Middle Name** _____ **Last Name** _____

Social Security # _____

Marital Status: Single/Never Married Married Divorced Separated Widowed

SPOUSE (if filing JOINT):

First _____ **Middle** _____ **Last** _____

Spouse's Social Security # _____

What is the nature of your debts? Consumer/Non-Business Business

Other names used (personal and business) in the last eight (8) years? Please indicate who used the name.

Have you previously filed for Bankruptcy within the last 8 years? No Yes

Who filed? Debtor Spouse Both What chapter? 7 11 13

Case Number: _____ Date Filed: _____ Where filed : _____

IN THE PAST 6 YEARS has the following applied to you? No Yes: Circle all that apply

(1) sole proprietor, (2) independent contractor, (3) DBA, (4) business-related debt, (5) receive 1099s?

Name(s) of Business: _____

Nature of Business: _____

Business Address: _____

Started Date: _____ End Date: _____ Tax ID #: _____

CPA/Tax Preparer: _____

Address: _____

YOUR PROPERTY

LIST ALL REAL ESTATE:

Address: _____

Approx. Current Market Value \$ _____ Total Amount Owed on this property \$ _____

Name(s) on Title: _____

Use reverse side to list more

LIST ALL VEHICLES:

Year _____ Make _____ Model _____ mileage _____

Kelley Blue Book "Private Market Value": \$ _____ (search online www.kbb.com) PAID OFF

Year _____ Make _____ Model _____ mileage _____

Kelley Blue Book "Private Market Value": \$ _____ (search online www.kbb.com) PAID OFF

Use reverse side to list more

LIST ALL OPEN BANK ACCOUNTS:

Bank: _____ type of account: _____ account # _____ balance \$ _____

Do you have any loans or owe money to this bank? No Yes

Bank: _____ type of account: _____ account # _____ balance \$ _____

Do you have any loans or owe money to this bank? No Yes

Use reverse side to list more

Typical Amount of Cash on Hand: \$ _____

Security Deposit held by Landlord: \$ _____

Household Goods and Furnishings: Estimated garage sale value: \$ _____

Clothing: Estimated garage sale value: \$ _____

Collectables such as books, pictures, art objects, stamps, coins

Description: _____ Estimated garage sale value: \$ _____

Jewelry (List individual items worth over \$1,000 separately)

Description: _____ Current Market Value: \$ _____

Firearms, sports equipment and other hobby equipment

Description: _____ Current Market Value: \$ _____

Timeshares:

Description: _____ Current Market Value: \$ _____

Boats, RV's, Motorcycles and Trailers

Year, Make, Model: _____ Current Market Value: \$ _____

Whole Life insurance policies (do not list if no cash value):

Name of insurance company: _____

Cash Surrender Value: _____

Retirement, Annuity, Pension, IRA, 401(k), etc. Owner: Debtor Spouse

Description: _____ Current Balance: \$ _____

Do you currently have a loan against this? No Yes: Balance \$ _____

Overdue Alimony/Child Support owed to you:

Description: _____ Balance Owed: \$ _____

Other liquidated debts owed to you, including expected Tax Refunds:

Description: _____ Value: \$ _____

Interests in Businesses, Partnerships, Corporations, etc.

Description: _____

Any other valuable property

Brief Description: _____

Market Value: _____

Owner: Debtor Spouse Joint Community Property

Use the back side of paper if necessary.

YOUR DEBTS

1st Mortgage

Lender: _____

Balance Owed \$ _____ Months in arrears: _____ Date Loan Incurred: _____

2nd Mortgage, Equity Line, etc.

Lender: _____

Balance Owed \$ _____ How many months in arrears? _____ Date Loan Incurred: _____

AUTO LOANS:

Which Auto? _____ Lender: _____

Balance Owed: _____ Months in Arrears: _____ Monthly payment: \$ _____ Interest rate: _____%

Which Auto? _____ Lender: _____

Balance Owed: _____ Months in Arrears: _____ Monthly payment: \$ _____ Interest rate: _____%

Federal and State Taxes Owed

Have you timely filed your returns? _____ If not, list delinquent year(s): _____

Amounts owed for each year: _____

UNSECURED DEBTS: All debt must be reported to court. Attach credit card statements, medical bills, etc.

Is anyone else a CO-DEBTOR on a debt? No Yes: On which account? _____

Co-Debtor Name and address: _____

Do you have a Business Lease or Contract? No Yes

Description: _____

Please provide us with statements for each debt, creditor, credit cards, etc.

YOUR MONTHLY INCOME

	DEBTOR	SPOUSE (if applicable)
Marital Status:	single / married / separated / divorced	
Age:	_____	_____
Employer Name:	_____	_____
& Address:	_____	_____
	_____	_____
Title/Occupation:	_____	_____
How Long Employed:	_____	_____

Dependant(s):

RELATIONSHIP	AGE		
son / daughter / _____	_____	was s/he claimed on your last tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No
son / daughter / _____	_____	was s/he claimed on your last tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No
son / daughter / _____	_____	was s/he claimed on your last tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No

HOW OFTEN DO YOU RECEIVE A PAYCHECK?

<input type="checkbox"/> Every 2 weeks (26 paychecks/year)	<input type="checkbox"/> None; I am self employed	<input type="checkbox"/> Every week
<input type="checkbox"/> Twice a month: the 1 st and the 15 th (24 paychecks/year)	<input type="checkbox"/> None; I receive 1099s	<input type="checkbox"/> Once a month

	DEBTOR	SPOUSE
Gross Income		
Current monthly gross wages, salary, commissions	\$ _____	\$ _____
Estimated monthly overtime	\$ _____	\$ _____
Less Deductions		
Payroll Taxes and Social Security Deducted	_____	_____
Insurance Deducted	_____	_____
Union Dues Deducted	_____	_____
Other payroll deductions. Please specify	_____	_____
Plus Additional Income		
Regular monthly income from business, profession or farm	_____	_____
Monthly income from real property	_____	_____
Monthly interest and dividends	_____	_____
Alimony, maintenance or support payments	_____	_____
Social Security, Unemployment, Disability (gov't assistance)	_____	_____
Pension or retirement	_____	_____
Other income: _____ monthly amount:	_____	_____
<u>TOTAL MONTHLY NET INCOME:</u>	\$ _____	\$ _____

Please describe any increase or decrease of more than 10% in any previous category anticipated to occur in the year following this filing. _____

YOUR MONTHLY EXPENSES

Rent \$ _____

First Mortgage \$ _____

Second Mortgage \$ _____

Does mortgage include property taxes? Yes No
 And insurance? Yes No

Monthly - round to the nearest \$10

Gas and Electric.....\$ _____

Water and Sewer\$ _____

Telephone.....\$ _____

Cable\$ _____

Cell Phone\$ _____

Garbage.....\$ _____

Internet Access\$ _____

Other Utilities. Please specify _____ ...\$ _____

Home/Apartment maintenance\$ _____

Food.....\$ _____

Clothing.....\$ _____

Laundry and dry cleaning.....\$ _____

Medical and dental expenses.....\$ _____ (co-pays)

Transportation (not including car payments)\$ _____

Recreation, clubs and entertainment, newspapers, etc. \$ _____

Charitable contributions\$ _____ (be prepared to substantiate)

Homeowner's or rental insurance\$ _____

Life Insurance\$ _____

Health Insurance (paid out of pocket)\$ _____ (not already deducted from paycheck)

Auto Insurance.....\$ _____

Other insurance – Please specify _____ ...\$ _____

Property taxes.....\$ _____

Other Taxes (i.e. self-employment).....\$ _____ (not already deducted from paycheck)

Installment Auto Payments\$ _____

Court-ordered child and/or spousal support payments \$ _____ (attach Court Order)

Daycare.....\$ _____

Other expenses. Please specify _____ ...\$ _____

TOTAL \$ _____

STATEMENT OF FINANCIAL AFFAIRS

2011 GROSS INCOME:

DEBTOR: gross wages \$ _____ Gross business income \$ _____ other \$ _____
SPOUSE: gross wages \$ _____ Gross business income \$ _____ other \$ _____

2010 GROSS INCOME:

DEBTOR: gross wages \$ _____ Gross business income \$ _____ other \$ _____
SPOUSE: gross wages \$ _____ Gross business income \$ _____ other \$ _____

Creditors who received more than \$600 in the past 3 months? (continue on back side)

Creditor _____ Last month paid \$ _____ 2 months ago \$ _____ 3 months ago \$ _____

Have you taken any cash advances or made any large credit card purchases or within the past year?

No Yes--Specify: _____

Payments to relatives for loans in the past 12 months.

Name	Relationship	Date(s) of Payment	Amount Paid
_____	_____	_____	\$ _____

Have you been sued within the last 12 months? No Yes--Provide copies of all lawsuits

Any property garnished, levied, attached, repossessed, or foreclosed on during the last 12 months?

Creditor: _____ Date: _____ Value:\$ _____ Description: _____

Have you given gifts of value greater than \$1,000 in the last 12 months (including to family members)?

Name/Address	Relationship	Date(s) of Payment	Value
_____	_____	_____	\$ _____

Have you transferred property during past 2 years. (e.g. Sale, Short Sale, Title transfer, etc.)

Address or Description of Property	Date Transferred	To Whom?
_____	_____	_____

List closed, sold or otherwise transferred any financial accounts and instruments in the last year, (checking, savings, CD's, pension funds, brokerage accounts, etc.)

Bank	Type of Account	Account #	Value at closing \$	Date Closed
_____	_____	_____	_____	_____

List your residences within the last THREE (3) years.

Address: _____ Dates of Occupancy from _____ to: _____
Address: _____ Dates of Occupancy from _____ to: _____

Do you have a safe deposit box with valuables kept inside? No Yes

Spouses during past 8 years (divorced/widowed/separated or if filing separately).

Name(s) of Former Spouse(s)	Date(s) of Divorce	State(s) of Residence
_____	_____	_____

Use the back side of paper if necessary.