



**Category of Property**

**Property Value**

a. Real Property: \_\_\_yes \_\_\_no \_\_\_\_\_ \$ \_\_\_\_\_

**Provide legal description from abstract or deed:**

**Proof of Recorded Mortgage(s):**

**Property Tax Statement:**

**Time Share?**

List Mortgage Company(s) name and amount owed:

b. Cash on hand \_\_\_\_\_ \$ \_\_\_\_\_

c. All Banks and/or Credit Union Accounts:

Name of Bank: \_\_\_\_\_ Current amount in checking: \$ \_\_\_\_\_

Current amount in savings: \$ \_\_\_\_\_

Name of Bank: \_\_\_\_\_ Current amount in checking: \$ \_\_\_\_\_

Current amount in savings: \$ \_\_\_\_\_

d. Security deposits for public utilities, landlords \_\_\_\_\_ \$ \_\_\_\_\_

e. Household goods, furnishings and Collectables \_\_\_\_\_ \$ \_\_\_\_\_

Computer? Ipad? \_\_\_\_\_ \$ \_\_\_\_\_

f. Clothing \_\_\_\_\_ \$ \_\_\_\_\_

g. Furs and jewelry \_\_\_\_\_ \$ \_\_\_\_\_

h. Firearms (list Make & Model(s)) \_\_\_\_\_ \$ \_\_\_\_\_

i. Life insurance policies w/cash value \_\_\_\_\_ \$ \_\_\_\_\_

j. IRA, PERA, 401k, Annuities \_\_\_\_\_ \$ \_\_\_\_\_

k. People who owe you money \_\_\_\_\_ \$ \_\_\_\_\_

l. Alimony, maintenance paid to you \_\_\_\_\_ \$ \_\_\_\_\_

m. Amount of last year's tax refunds \_\_\_\_\_ (Federal) \$ \_\_\_\_\_

(property tax) \$ \_\_\_\_\_ (State) \$ \_\_\_\_\_

n. Autos, trucks and other vehicles

1. Year \_\_\_\_\_ Mileage \_\_\_\_\_ Make/Model \_\_\_\_\_ \$ \_\_\_\_\_

Amount owed \$ \_\_\_\_\_ Creditor \_\_\_\_\_

2. Year \_\_\_\_\_ Mileage \_\_\_\_\_ Make/Model \_\_\_\_\_ \$ \_\_\_\_\_

Amount owed \$ \_\_\_\_\_ Creditor \_\_\_\_\_

3. Year \_\_\_\_\_ Mileage \_\_\_\_\_ Make/Model \_\_\_\_\_ \$ \_\_\_\_\_

Amount owed \$ \_\_\_\_\_ Creditor \_\_\_\_\_

o. Boats, motors, trailers, 4 wheeler, snowmobiles \_\_\_\_\_ \$ \_\_\_\_\_

Year \_\_\_\_\_ Make/Model \_\_\_\_\_ Amount Owed \$ \_\_\_\_\_

Boats, motors, trailers, 4 wheeler, snowmobiles \_\_\_\_\_ \$ \_\_\_\_\_

Year \_\_\_\_\_ Make/Model \_\_\_\_\_ Amount Owed \$ \_\_\_\_\_

p. Office equipment, furnishings, and supplies \_\_\_\_\_ \$ \_\_\_\_\_

q. Machinery, fixtures, equipment, Inventory \_\_\_\_\_ \$ \_\_\_\_\_

r. Stocks or bonds \_\_\_\_\_ \$ \_\_\_\_\_

s. Pets \_\_\_\_\_ \$ \_\_\_\_\_

**Gross Income** - Provide last 6 months of paystubs

Debtor

Spouse

\_\_\_ Monthly, \_\_\_ weekly, \_\_\_ bi-weekly income **Debtor** \$ \_\_\_\_\_ /mo

\_\_\_ Monthly, \_\_\_ weekly, \_\_\_ bi-weekly income **Spouse** \$ \_\_\_\_\_ /mo

Any other income (employer, pension, social security) \$ \_\_\_\_\_ \$ \_\_\_\_\_

Do you receive any child support: \_\_\_ yes \_\_\_ no \$ \_\_\_\_\_

**Personal Monthly Expenses**

Monthly **Rent or Mortgage** (circle one) \_\_\_\_\_ \$ \_\_\_\_\_

Second Mortgage payment \_\_\_\_\_ \$ \_\_\_\_\_

Does Mortgage include Taxes and Insurance? **YES or NO (circle one)**

Home maintenance \_\_\_\_\_ \$ \_\_\_\_\_

Electricity and heating fuel \_\_\_\_\_ \$ \_\_\_\_\_

Water and sewer \_\_\_\_\_ \$ \_\_\_\_\_

Telephone \_\_\_\_\_ \$ \_\_\_\_\_

Cell phone \_\_\_\_\_ \$ \_\_\_\_\_

Garbage \_\_\_\_\_ \$ \_\_\_\_\_

Internet \_\_\_\_\_ \$ \_\_\_\_\_

Cable \_\_\_\_\_ \$ \_\_\_\_\_

Other Utilities \_\_\_\_\_ \$ \_\_\_\_\_

Food \_\_\_\_\_ \$ \_\_\_\_\_

Clothing \_\_\_\_\_ \$ \_\_\_\_\_

Laundry/Dry Cleaning \_\_\_\_\_ \$ \_\_\_\_\_

Medical/dental \_\_\_\_\_ \$ \_\_\_\_\_

Transportation \_\_\_\_\_ \$ \_\_\_\_\_

Recreation/entertainment \_\_\_\_\_ \$ \_\_\_\_\_

Charitable contribution \_\_\_\_\_ \$ \_\_\_\_\_

Homeowner or renter insurance (if not escrowed) \_\_\_\_\_ \$ \_\_\_\_\_

Life insurance \_\_\_\_\_ \$ \_\_\_\_\_

Health insurance \_\_\_\_\_ \$ \_\_\_\_\_

Auto insurance \_\_\_\_\_ \$ \_\_\_\_\_

Other insurance \_\_\_\_\_ \$ \_\_\_\_\_

Real estate taxes (if not escrowed) \_\_\_\_\_ \$ \_\_\_\_\_

Other taxes (additional federal or state taxes-not from wages) \_\_\_\_\_ \$ \_\_\_\_\_

Auto installments (which vehicle) \_\_\_\_\_ \$ \_\_\_\_\_

Auto Installments \_\_\_\_\_ \$ \_\_\_\_\_

Student Loan \_\_\_\_\_ \$ \_\_\_\_\_

Other installments \_\_\_\_\_ \$ \_\_\_\_\_

Child support payments \_\_\_\_\_ \$ \_\_\_\_\_

Toiletries and household needs \_\_\_\_\_ \$ \_\_\_\_\_

\*\* Spousal support paid \_\_\_\_\_ \$ \_\_\_\_\_

\*\* Other expenses \_\_\_\_\_ \$ \_\_\_\_\_

Pet expenses \_\_\_\_\_ \$ \_\_\_\_\_

Auto tabs and postage \_\_\_\_\_ \$ \_\_\_\_\_

School Supplies \_\_\_\_\_ \$ \_\_\_\_\_

**Total Monthly Expenses** \$ \_\_\_\_\_

**Employment Information**

Debtor: \_\_\_\_\_ Spouse: \_\_\_\_\_  
Employers Name: \_\_\_\_\_ Employers Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
Address: \_\_\_\_\_ Address: \_\_\_\_\_  
Position: \_\_\_\_\_ Position \_\_\_\_\_  
Length of time employed \_\_\_\_\_ Length of time employed \_\_\_\_\_

Are you self-Employed?  
Business name: \_\_\_\_\_

Address of business: \_\_\_\_\_

How long in business: \_\_\_\_\_

EIN: \_\_\_\_\_

Sole Proprietorship \_\_\_\_\_ Corporation \_\_\_\_\_ or Limited Liability Corporation \_\_\_\_\_

**Engaged in Business**

Name of person who kept books for you \_\_\_\_\_

Name and address of person doing audit in last six years \_\_\_\_\_

Name and address of person who has records \_\_\_\_\_

Describe any financial statements \_\_\_\_\_

Describe the last two inventories \_\_\_\_\_

**Previous Years Income Information:**

Current Year: \$ \_\_\_\_\_

2015 Gross Income from taxes \$ \_\_\_\_\_

2014 Gross Income from taxes \$ \_\_\_\_\_

**Describe Any of the Following Below:**

Attached, garnishment, or seizure of wages or bank accounts:

Gifts or contribution to family members in the last year:

Has any family members loaned you money that you've paid back within the last year?

Have you transferred any property to a family member or friend for under fair market value in the past 6 years? If yes, please explain:

Have you closed a bank account in the past year?  
If so, where and when?

Do you have a safe deposit box?  
If so, where? What is inside?

Are you storing any property for someone else?

Executory contract, lease, etc.:

Have you co-signed for on a loan for anyone?  
If so, who did you sign for and who is the creditor?

Has anyone co-signed for you?  
If so, who signed and who is the creditor?

Have you given any ONE credit card or unsecured creditor \$600 total within 90 days?

Have you used your credit cards within 90 days? \_\_\_\_\_ Amount charged \$\_\_\_\_\_

Have you taken any cash advances in the last 70 days? \_\_\_\_\_ Amount \$\_\_\_\_\_

Have you had anything repossessed in the last year? If so, please explain:

Have you had a foreclosure in the last year or are you currently in foreclosure? Please explain:

Do you expect to come into an inheritance, trust, life estate or legal settlement?

Is your name on someone else's land or bank accounts? If so, please explain:

Please list on the back any asset (vehicle, boat, camper, 4 wheeler, snowmobile, etc.) that you have sold within the last 2 years. Please list name of person item sold to, date sold, and amount sold for.

Have you ever filed for bankruptcy before?

When? \_\_\_\_\_ Where? \_\_\_\_\_

How did you hear about our office? \_\_\_\_\_