

Category of Property

Property Value

a. Real Property: ___yes ___no _____ \$ _____

Provide legal description from abstract or deed:

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: \$ _____

Do you owe them money? Current amount in savings: \$ _____

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

Current amount in savings: \$ _____

*****Wells Fargo will freeze if large sum in acct day of filing

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

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

Computer? Ipad? _____ \$ _____

f. Clothing _____ \$ _____

g. Furs and jewelry describe: _____ \$ _____

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. Riding Lawn Mower? Snow Blower? Make model and value _____ \$ _____

r. Stocks or bonds (bitcoin?) _____ \$ _____

s. Pets _____ \$ _____

Gross Income - Provide last 6 months of paystubs

Debtor

Spouse

___2x Monthly, ___ weekly, ___ bi-weekly income **Debtor**

\$

___2x Monthly, ___ weekly, ___ bi-weekly income **Spouse**

\$

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 _____

Have you been self-Employed in last 8 years?

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: \$ _____

2017 Gross Income from taxes \$ _____

2018 Gross Income from taxes \$ _____

Describe Any of the Following Below:

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

Gifts or contribution of \$600 or more 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?
Storage Unit? Name Address, contents:

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 -Work Comp, Personal Injury? Do you expect to come into money from a previous surgery?

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? _____