

Client Questionnaire for Non-Business Debtor

**Tourkow Crell Rosenblatt & Johnston**

127 West Berry Street, Ste. 1200

Fort Wayne IN 46802

260-426-0545

[www.tcrjlaw.com](http://www.tcrjlaw.com)

Section 1 Basic Information

**Part A. Name and Address**

Name: \_\_\_\_\_  
*Last First Middle*

Telephone Number Home: \_\_\_\_\_ Work: \_\_\_\_\_

Have you used any other names in the past eight years? \_\_\_\_No \_\_\_\_Yes if yes, list other names:

\_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

County: \_\_\_\_\_ Have you lived at this address for at least 180 days? \_\_\_\_No \_\_\_\_Yes  
If you have a different mailing address, please list:

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Part B. Name and Address of Spouse**

If you are filing jointly with your spouse, fill in the following information about your spouse:

Name: \_\_\_\_\_  
*Last First Middle*

Has your spouse used any other names in the past eight years? \_\_\_\_No \_\_\_\_Yes if yes, list other names:

\_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Address: (if different from your address): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

If your spouse has a different mailing address, please list:

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Part C. Prior/Pending Bankruptcy Cases**

Has a bankruptcy case been filed by you or against you in the last eight years? \_\_\_\_ No \_\_\_\_ Yes

If yes, in which district of which state was the case filed? \_\_\_\_\_

Case Number: \_\_\_\_\_ Date filed: \_\_\_\_\_

Are there currently any bankruptcy cases pending against you, your business, your spouse, or

Your spouse's business \_\_\_\_ No \_\_\_\_ Yes

If yes, name of debtor: \_\_\_\_\_ Relationship to you: \_\_\_\_\_

Case Number: \_\_\_\_\_ Date filed: \_\_\_\_\_

Judge: \_\_\_\_\_ in which district of which state was the

Case filed? \_\_\_\_\_

**Exhibit "C" to the Voluntary Petition** Do you own or have possession of any property that poses or is alleged to pose a threat of imminent and identifiable harm to public health or safety? \_\_\_\_ No \_\_\_\_ Yes (If yes, please attach a list and description of the property.)

Section 2 Property

Part A. Real Estate (Schedule A)

List all real estate which you own or are a joint owner of, even if you still owe money on the property.

1) Address and description of property: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Owned by Husband, Wife, Joint or Community? \_\_\_\_\_

Current market value: \_\_\_\_\_ your % ownership, or \$ amount, if you and spouse are not sole owners \_\_\_\_\_

First Mortgage Creditor: Amount of Secured Claim \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Second Mortgage Creditor: Amount of Secured Claim \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Co-Debtor/Additional Notice:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

**Retain/Reaffirm** or **Surrender** property.

2) Address and description of property: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Owned by Husband, Wife, Joint or Community? \_\_\_\_\_

Current market value: \_\_\_\_\_ your % ownership, or \$ amount, if you and spouse are not sole owners \_\_\_\_\_

Secured Creditor: Amount of Secured Claim \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Co-Debtor/Additional Notice:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

**Retain/Reaffirm** or **Surrender** property.

## Part B. Personal Property (Schedule B)

For each type of property listed below, fill in the information. You can think of the market value as the resale value.

### PERSONAL PROPERTY

1. Cash on hand. Amount \$ \_\_\_\_\_

2. Checking/Savings Account, Certificates of deposit, other bank accounts.

a) Bank Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \_\_\_\_\_

b) Bank Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

c) Bank Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

d) Bank Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

3. Security Deposits held by utility companies, landlord.

a) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

c) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

4. Household goods, furniture, including audio, video and computer equipment.

Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Amount \$ \_\_\_\_\_

5. Books, pictures, art objects, records, compact disc, collectibles.

Description \_\_\_\_\_

\_\_\_\_\_ Amount \$ \_\_\_\_\_

6. Clothing. Amount \$ \_\_\_\_\_

7. Furs and Jewelry.

Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

8. Sports, photographic, hobby equipment, firearms.

Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

9. Interest in insurance policies-specify refund or cancellation value.

a) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

c) Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

10. Annuities.

Name \_\_\_\_\_ Account # \_\_\_\_\_ Amount \$ \_\_\_\_\_

11. Interest in pension or profit sharing plans.

a) Type of Plan \_\_\_\_\_ Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Type of Plan \_\_\_\_\_ Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

12. Stock and interests in incorporated/unincorporated business.

a) Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

c) Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

13. Interest in partnerships/joint ventures.

Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

14. Bonds.

Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

15. Accounts Receivable.

a) Name \_\_\_\_\_ Amount \$ \_\_\_\_\_

16. Alimony/family support to which you are entitled.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

17. Other liquidated debts owed to you, including tax refunds.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

18. Equitable or future interests or life estates.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

19. Interests in estate of decedent or life insurance plan or trust.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

20. Other contingent/un-liquidated claims, including tax refunds, counterclaims.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

21. Patents, copyrights, and other intellectual property.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

22. Licenses, franchises.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

23. Automobiles, trucks, trailers, and accessories.

a) Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Amount \$ \_\_\_\_\_

Secured Creditor: Amount of Secured Claim: \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Co-Debtor/Additional Notice:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

**Retain/Reaffirm** or **Surrender** property.

b) Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Amount \$ \_\_\_\_\_

Secured Creditor: Amount of Secured Claim: \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Co-Debtor/Additional Notice:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

**Retain/Reaffirm** or **Surrender** property.

c) Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Amount \$ \_\_\_\_\_

Secured Creditor: Amount of Secured Claim: \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Name: \_\_\_\_\_ Account Number \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Co-Debtor/Additional Notice:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

**Retain/Reaffirm** or **Surrender** property.

25. Aircraft and accessories.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

26. Office equipment, supplies.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

27. Machinery, fixtures etc. for business.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

28. Inventory.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

29. Animals.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

30. Crops - growing or harvested.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

31. Farming equipment and implements.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

32. Farm supplies, chemicals, feed.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

33. Other personal property of any kind not listed.

a) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

b) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

c) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

d) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

e) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

f) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

g) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

h) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

i) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

j) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_

k) Description \_\_\_\_\_ Amount \$ \_\_\_\_\_



### Section 3 Debts

List below all debts that you owe, or that creditor's claim that you owe. (Other than those previously listed)

#### Bank Loans (other than mortgage and auto)

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

c) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

d) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Personal loans**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Loan: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Student loans**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Major credit card debts** (Visa, Am Ex, Master Card, Discover)

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

c) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

d) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

e) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Department store credit card debts**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

c) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

d) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

e) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Other credit card debts** (Gas cards, phone cards, etc.)

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

c) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

d) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

e) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Unpaid medical bills**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Medical Condition: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Medical Condition: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

c) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Medical Condition: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

d) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Medical Condition: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

e) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Medical Condition: \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

### **Unpaid Utility bills**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

**Unpaid rent**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Unpaid Taxes**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

**Unpaid alimony or child support**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

**Unpaid service fees**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_



Reason for Service: \_\_\_\_\_

**All other unpaid debts/bills**

a) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

b) Creditor's Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date/range of dates when debt was incurred: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Co-Debtor/Additional Notice: \_\_\_\_\_

Is debt secured by any property? \_\_\_\_\_

Reason for Debt: \_\_\_\_\_

**Section 4 Unexpired Leases and Contracts (Schedule G)**

List below any current leases or contracts that you are a party to. Include residential, car and business leases, and service or business contracts.

1) Nature and Description of Contract: \_\_\_\_\_

Name and Address of Other Party or Parties: \_\_\_\_\_

\_\_\_\_\_

Date that Contract Expires: \_\_\_\_\_

2) Nature and Description of Contract: \_\_\_\_\_

Name and Address of Other Party or Parties: \_\_\_\_\_

\_\_\_\_\_

Date that Contract Expires: \_\_\_\_\_

3) Nature and Description of Contract: \_\_\_\_\_

Name and Address of Other Party or Parties: \_\_\_\_\_

\_\_\_\_\_

Date that Contract Expires: \_\_\_\_\_

4) Nature and Description of Contract: \_\_\_\_\_

Name and Address of Other Party or Parties: \_\_\_\_\_

\_\_\_\_\_

Date that Contract Expires: \_\_\_\_\_

5) Nature and Description of Contract: \_\_\_\_\_

Name and Address of Other Party or Parties: \_\_\_\_\_

\_\_\_\_\_

Date that Contract Expires: \_\_\_\_\_

**Section 5 Current Income**

Marital Status: \_\_\_\_\_ Married \_\_\_\_\_ Single \_\_\_\_\_ Divorced \_\_\_\_\_ Separated \_\_\_\_\_ Widowed  
List all dependents of you and your spouse, their ages, and their relationship to you:

- 1) Name \_\_\_\_\_ Age \_\_\_\_\_ Relationship \_\_\_\_\_
- 2) Name \_\_\_\_\_ Age \_\_\_\_\_ Relationship \_\_\_\_\_
- 3) Name \_\_\_\_\_ Age \_\_\_\_\_ Relationship \_\_\_\_\_
- 4) Name \_\_\_\_\_ Age \_\_\_\_\_ Relationship \_\_\_\_\_
- 5) Name \_\_\_\_\_ Age \_\_\_\_\_ Relationship \_\_\_\_\_

**Part A. Debtor's Income**

- 1) What is your occupation? \_\_\_\_\_
- 2) Name and address of your employer: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ City State Zip

3) How long have you been employed there? \_\_\_\_\_

4) What is the gross amount of your paycheck, before taxes, other deductions are taken out?  
\_\_\_\_\_

5) How often do you get paid? \_\_\_\_\_ weekly \_\_\_\_\_ every two weeks \_\_\_\_\_ twice a month \_\_\_\_\_ monthly

6) Do you receive overtime pay outside of your salary? If so, how much per month? \$ \_\_\_\_\_

7) How much is taken out of each paycheck for taxes and social security? \$ \_\_\_\_\_

8) How much is taken out for insurance? \$ \_\_\_\_\_ 9) Union Dues? \$ \_\_\_\_\_

10) Are there other deductions? If so, what are they and how much? \_\_\_\_\_

Do you receive?

a) Income from business operations outside of your regular paycheck listed above? If so, what  
is the business and how much do you receive per month? \_\_\_\_\_

b) Income from real estate property? If so, how much per month? \$ \_\_\_\_\_

c) Interest or dividends? If so, how much per month? \$ \_\_\_\_\_

d) Alimony or family support payments for your use or for the care of your dependents? If so,  
How much per month? \$ \_\_\_\_\_

e) Social security or other forms of monetary government assistance? If so, how much per

Month? \$ \_\_\_\_\_

f) Retirement or pension money? If so, how much per month? \$ \_\_\_\_\_

Do you have any other sources of income not listed? \_\_\_\_\_

**Part B. Joint Debtor's Income**

1) What is your occupation? \_\_\_\_\_

2) Name and address of your employer: \_\_\_\_\_

\_\_\_\_\_

City	State	Zip
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3) How long employed there? \_\_\_\_\_

4) What is the gross amount of your paycheck, before taxes/other deductions? \_\_\_\_\_

5) How often do you get paid? \_\_\_weekly \_\_\_every two weeks \_\_\_twice a month \_\_\_monthly

6) Do you receive overtime pay outside of your salary? \_\_\_\_\_  
If so, how much per month? \$ \_\_\_\_\_

7) How much is taken out of each paycheck for taxes and social security? \$ \_\_\_\_\_

8) How much is taken out for insurance? \$ \_\_\_\_\_ 9) Union Dues? \$ \_\_\_\_\_

10) Are there other deductions? If so, what are they and how much? \_\_\_\_\_

Do you receive...?

a) Income from business operations outside of your regular paycheck listed above? If so, what  
is the business and how much do you receive per month? \_\_\_\_\_

b) Income from real estate property? If so, how much per month? \$ \_\_\_\_\_

c) Interest or dividends? If so, how much per month? \$ \_\_\_\_\_

d) Alimony or family support payments for your use or for the care of your dependents? If so,  
How much per month? \$ \_\_\_\_\_

e) Social security or other forms of monetary government assistance?  
If so, how much per month? \$ \_\_\_\_\_

f) Retirement or pension money? If so, how much per month? \$ \_\_\_\_\_

Do you have any other sources of income not listed? \_\_\_\_\_

Are you expecting any increase or decrease in salary of more than 10% next  
year? If so, explain. \_\_\_\_\_

## Section 6 Current Expenses

Do you and your spouse maintain separate households? \_\_\_\_ No \_\_\_\_ Yes. If so, fill one page out for your household and another for your spouse's.

The following questions ask for your expenses each month. If you are unsure of the amount you pay each month, but know the amount for a different period (per week, per day, every 2 months, etc.), write in the amount and the frequency that you pay the amount.

### Indicate how much you pay for each item each month...

1. Your rent or your home mortgage \$ \_\_\_\_\_  
Does that amount include real estate taxes? \_\_\_\_ No \_\_\_\_ Yes  
Does it include property insurance? \_\_\_\_ No \_\_\_\_ Yes
2. Electricity and heating \$ \_\_\_\_\_
3. Water and sewage \$ \_\_\_\_\_
4. Telephone service/long distance \$ \_\_\_\_\_
5. Do you have any other utility bills? If so, what, and how much per month?  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_
6. Home maintenance, including repairs and general upkeep \$ \_\_\_\_\_
7. Food \$ \_\_\_\_\_
8. Clothing \$ \_\_\_\_\_
9. Laundry and dry cleaning \$ \_\_\_\_\_
10. Medical and dental expenses \$ \_\_\_\_\_
11. Transportation (not including car payments) \$ \_\_\_\_\_
12. Entertainment, recreation, newspapers, magazines \$ \_\_\_\_\_
13. Charitable contributions \$ \_\_\_\_\_

14. Insurance not deducted from paycheck
- a) Homeowner's or renter's insurance \$ \_\_\_\_\_
  - b) Life insurance \$ \_\_\_\_\_
  - c) Health insurance \$ \_\_\_\_\_
  - d) Auto insurance \$ \_\_\_\_\_
  - e) Other insurance \_\_\_\_\_ \$ \_\_\_\_\_
15. Taxes not deducted from paycheck \$ \_\_\_\_\_
16. Installment payments for car, furniture, etc. (Specify)
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
17. Alimony, maintenance, support paid to others \$ \_\_\_\_\_
18. Payments for support of dependents not living at home \$ \_\_\_\_\_
19. Expenses from operation of business \$ \_\_\_\_\_
20. Other expenses not listed above \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_



b) List all payments made within **one year** immediately preceding the commencement of this case to creditors who were "insiders". (Insiders include your relatives, your business partners and their relatives, your corporations, or your affiliates.)

Name and address of Creditor/Relationship	Dates of Payments	Amount	Amount Due

4. Suits, executions, garnishments and attachments

a. List all suits and administrative proceedings to which you are or were a party within **one year** preceding the filing of this case. \_\_\_\_\_ NONE

Caption of Suit and Case Number	Nature of Proceeding	Court or Agency and Location	Status or Disposition

b. Describe all property that has been garnished, seized, or attached under any legal or equitable process within **one year** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Person/Company for Whom the Property Was Seized (Creditor)	Date of Seizure	Description and Value of Property

5. Repossessions, foreclosures, and returns

List all property that has been repossessed by a creditor, sold at a foreclosure sale, transferred through a deed in lieu of foreclosure, or returned to the seller, within **one year** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Creditor	Date of Repossession, Foreclosure, Transfer or Return	Description and Value of Property

6. Assignments and receiverships

a) Describe any assignment of property for the benefit of creditors made within **120 days** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Assignee	Date of Assignment	Terms of Assignment/Settlement



b) List all property which has been in the hands of a custodian, receiver, or court-appointed official within one year immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Custodian	Name and location of Court, Case Title and Number	Date of Order	Description and Value of Property
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7. Gifts

List all gifts or charitable contributions made within **one year** immediately preceding the commencement of this case except ordinary and usual gifts to family members aggregating less than \$200 in value per individual family member and charitable contributions aggregating less than \$100 per recipient. \_\_\_\_\_ NONE

Name and Address of Recipient	Relationship to You, if Any	Date of Gift	Description and Value of Gift
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8. Losses

List all losses from fire, theft, gambling or other casualty within **one year** immediately preceding the commencement of this case **or since the commencement of this case**. \_\_\_\_\_ NONE

Description and Value of Property	Description of Circumstances and Amount Covered by Insurance, if Any	Date of Loss
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9. Payments related to debt counseling or bankruptcy

List all payments made or property transferred by or on behalf of the debtor to any persons, including attorneys, for consultation concerning debt consolidation, relief under the bankruptcy law or preparation of a petition in bankruptcy within **one year** immediately preceding the commencement of the case. \_\_\_\_\_ NONE

Name and Address of Payee	Date of Payment	Name of Person Who Paid, if Not You	Amount of Money/Description and Value of Property
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10. Other transfers, (including sale of your property)

List all other property, other than property transferred in the ordinary course of business or financial affairs transferred either absolutely or as security within **one year** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Transferee and Relationship to you	Date of Transfer	Description of Property Transferred and Value Received
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11. Closed financial accounts

List all financial accounts and instruments held in your name or for your benefit which were closed, sold, or otherwise transferred within **one year** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Institution	Type and Number of Account & Final Balance	Amount and Date of Sale or Closing
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12. Safe deposit boxes

List each safe deposit or other box or depository in which you have had securities, cash, or other valuables within **one year** immediately preceding commencement of this case. \_\_\_\_\_ NONE

Name and Address of Bank or Other Depository	Name and Address of Those With Access to Box or Depository	Description of Contents	Date of Transfer, if Any
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13. Setoffs

List all setoffs made by any creditor, including banks, against a debt or deposit of yours within **90 days** preceding the commencement of this case. \_\_\_\_\_ NONE

Name and Address of Creditor	Date of Setoff	Amount of Setoff
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14. Property held for another person

List all property that you hold or control that is owned by another person. \_\_\_\_\_ NONE

Name and Address of Owner	Description and Value of Property	Location of Property
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15. Prior address of debtor

If you have moved within the two years immediately preceding the commencement of this case, list all residences during the last two years, excluding your present address.

\_\_\_\_ NONE

Address	Your Name at the Time	Dates of Occupancy
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16. Spouses and Former Spouses

If you reside or resided in a community property state, commonwealth, or territory (including Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington, or Wisconsin) within the **six-year period** immediately preceding the commencement of the case, identify the name of your spouse and of any former spouse who resides or resided with you in the community property state. \_\_\_\_ NONE

Name \_\_\_\_\_

17. Environmental Information

For the purpose of this question, the following definitions apply:

ⒶEnvironmental Law means any federal, state, or local statute or regulation regulating pollution, contamination, releases of hazardous or toxic substances, wastes or material into the air, land, soil, surface water, groundwater, or other medium, including, but not limited to, statutes or regulations regulating the cleanup of these substances, wastes, or material.

ⒶSite means any location, facility, or property as defined under any Environmental Law, whether or not presently or formerly owned or operated by the debtor, including, but not limited to, disposal sites.

ⒶHazardous Material means anything defined as hazardous waste, hazardous substance, toxic substance, hazardous material, pollutant, or contaminant or similar term under the Environmental Law.

a) List the name and address of every site for which you received notice in writing by a governmental unit that it may be liable or potentially liable under or in violation of an Environmental Law. Indicate the governmental unit, the date of the notice, and, if known, the Environmental Law: \_\_\_\_ NONE

Site Name and Address	Name and Address of Governmental Unit	Date of Notice	Environmental Law
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b) List the name and address of every site for which you provided notice to a governmental unit of a release of Hazardous Material. Indicate the governmental unit to which the notice was sent and the date of the notice. \_\_\_\_ NONE

Site Name and Address	Name and Address of Governmental Unit	Date of Notice	Environmental Law
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c) List all judicial or administrative proceedings, including settlements or orders, under any Environmental Law with respect to which you are or were a party. Indicate the name and address of the governmental unit that is or was a party to the proceeding, and the docket number. \_\_\_\_\_ NONE

Name and Address of Governmental Unit	Docket Number	Status or Disposition
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18. Nature, location and name of business

a) If the debtor is an individual, list the names, addresses, taxpayer identification numbers, nature of the businesses, and beginning and ending dates of all businesses in which the debtor was an officer, director, partner, or managing executive of a corporation, partnership, sole proprietorship, or was a self-employed professional within the **six years** immediately preceding the commencement of this case, or in which the debtor owned 5 percent or more of the voting or equity securities within the **six years** immediately preceding the commencement of this case.

If the debtor is a partnership, list the names, addresses, taxpayer identification numbers, nature of the businesses, and beginning and ending dates of all businesses in which the debtor was a partner or owned 5 percent or more of the voting or equity securities, within the **six years** immediately preceding the commencement of this case.

If the debtor is a corporation, list the names, addresses, taxpayer identification numbers, nature of the businesses, and beginning and ending dates of all businesses in which the debtor was a partner or owned 5 percent or more of the voting or equity securities within the **six years** immediately preceding the commencement of this case. \_\_\_\_\_ NONE

Name	Taxpayer I D Number	Address	Nature of Business	Beginning and End Dates of Operation
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B) Identify any business listed in response to subdivision a., above, that is a single asset real estate as defined in 11 U.S.C. S 101.

Name	Address
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