

Bankruptcy Worksheet

The fields expand as you type, use all the space you need.

Your full name

List all names you have used in the last 8 years, including trade names

Your Social Security Number

Full name of spouse (only if spouse is filing a joint petition with you)

List all names spouse has used in the last 8 years, including trade names

Spouse's Social Security Number

Your current address (include city, state, COUNTY, and zip) _____

Mailing address, if different from street address:

Your day time phone number _____

REAL ESTATE

LIST ALL REAL PROPERTY IN WHICH YOU HAVE AN INTEREST, INCLUDING PROPERTY YOU OWN OR ARE BUYING, PROPERTY OWNED AS A CO-TENANT, COMMUNITY PROPERTY, OR PROPERTY IN WHICH YOU HAVE A LIFE ESTATE.

Property address

What is the current value of this property?

Do you intend to keep this property and continue payments?

PERSONAL PROPERTY OWNERSHIP

List all personal property, of whatever kind below. If you have no property in one or more categories put "none". Do not list leased property in this section. If property you own is being held for you by someone else, list that person's name and address under Description and Location of property.

<u>TYPE OF PROPERTY</u>	<u>DESCRIPTION/LOCATION</u>	<u>VALUE</u>
1. CASH ON HAND		\$

2. CHECKING, SAVINGS, FINANCIAL ACCOUNTS, CERTIFICATES OF DEPOSIT, SHARES IN BANKS, SAVING AND LOAN, THRIFT, BUILDING, AND LOAN, HOMESTEAD ASSOCIATIONS OR CREDIT UNIONS, BROKERAGES OR COOPERATIVES		\$
3. SECURITY DEPOSITS WITH PUBLIC UTILITIES, TELEPHONE COMPANIES, LANDLORDS AND OTHERS		\$
4. HOUSEHOLD GOODS AND FURNISHINGS, INCLUDING AUDIO, VIDEO AND COMPUTER EQUIPMENT		\$
5. BOOKS, PICTURES AND OTHER ART OBJECTS, ANTIQUES, STAMP AND COIN COLLECTIONS OR COLLECTIBLES, RECORDS, TAPES, CDs		\$
6. WEARING APPAREL		\$
7. FURS AND JEWELRY		\$
8. FIREARMS AND SPORTS, PHOTOGRAPHIC, AND OTHER HOBBY EQUIPMENT		\$
9. INTEREST IN INSURANCE POLICIES. NAME INSURANCE COMPANY OF EACH POLICY AND ITEMIZE SURRENDER OR REFUND VALUE OF EACH		\$
10. ANNUITIES. ITEMIZE AND NAME EACH ISSUER		\$
11. INTEREST IN AN EDUCATION IRA OR QUALIFIED STATE TUITION PLAN		\$
12. INTERESTS IN IRA, ERISA, KEOGH OR OTHER PENSION OR PROFIT SHARING PLANS. ITEMIZE.		\$

13. STOCK AND INTERESTS IN INCORPORATED AND UNINCORPORATED BUSINESSES. ITEMIZE.		\$
14. INTERESTS IN PARTNERSHIPS OR JOINT VENTURES. ITEMIZE.		\$
15. GOVERNMENT OR CORPORATE BONDS AND OTHER NEGOTIABLE AND NON-NEGOTIABLE INSTRUMENTS		\$
16. ACCOUNTS RECEIVABLE		\$
17. ALIMONY, MAINTENANCE, SUPPORT, PROPERTY SETTLEMENTS TO WHICH YOU ARE OR MAY BE ENTITLED		\$
18. OTHER LIQUIDATED DEBTS OWED TO YOU, INCLUDING TAX REFUNDS.		\$
19. EQUITABLE OR FUTURE INTEREST, LIFE ESTATES AND RIGHTS OR POWERS EXERCISABLE FOR YOUR BENEFIT.		\$
20. CONTINGENT AND NON-CONTINGENT INTERESTS IN THE ESTATE OF A DECEDENT, DEATH BENEFIT PLAN, LIFE INSURANCE PLAN OR TRUST		\$
21. OTHER CONTINGENT AND UNLIQUIDATED CLAIMS OF EVERY NATURE, INCLUDING TAX REFUNDS, COUNTERCLAIMS, AND RIGHTS TO SET OFF CLAIMS. ITEMIZE		\$
22. PATENTS, COPYRIGHTS, AND OTHER INTELLECTUAL PROPERTY. GIVE DETAILS.		\$

23. LICENSES, FRANCHISES, AND OTHER GENERAL INTANGIBLES		\$
24. CUSTOMER LISTS OR OTHER COMPILATIONS CONTAINING PERSONALLY IDENTIFIABLE INFORMATION		\$
25. AUTOMOBILES, TRUCKS, TRAILERS OTHER VEHICLES		\$
26. BOATS, MOTORS, AND ACCESSORIES		\$
27. AIRCRAFT AND ACCESSORIES		\$
28. OFFICE EQUIPMENT, FURNISHINGS, AND SUPPLIES		\$
29. MACHINERY, FIXTURES, EQUIPMENT, AND SUPPLIES USED IN BUSINESS		\$
30. INVENTORY		\$
31. ANIMALS		\$
32. CROPS-GROWING OR HARVESTED		\$
33. FARMING EQUIPMENT AND IMPLEMENTS		\$
34. FARM SUPPLIES,CHEMICALS, FEED		\$
35. ALL OTHER PROPERTY OF ANY KIND NOT ALREADY LISTED.		\$

SECURED DEBTS

State the name, mailing address, including zip code, and last four digits of any account number of all entities holding claims secured by your property.

List all secured debts such as judgment liens, garnishments, statutory liens, auto loans, mortgages, deeds of trust, and other security interests.

Name of Creditor:
Address:
Account number: date debt incurred:
Amount owed Describe type of lien
Replacement value of collateral Do you wish to keep collateral and pay debt?
Name of Creditor:
Address:
Account number: date debt incurred:
Amount owed Describe type of lien
Replacement value of collateral Do you wish to keep collateral and pay debt?
Name of Creditor:
Address:
Account number: date debt incurred:
Amount owed Describe type of lien
Replacement value of collateral Do you wish to keep collateral and pay debt?
Name of Creditor:
Address:
Account number: date debt incurred:
Amount owed Describe type of lien
Replacement value of collateral Do you wish to keep collateral and pay debt?

PRIORITY DEBTS

List below all debts of the following type: Domestic support obligations; All federal, state, county, or other taxes owed; Wages salaries, commissions you owe to others; Money you owe to employee benefit plans; Deposits individuals have given you for purchase, lease, or rental of property; Claims of farmers and fisherman; Claims against you for death or personal injury while you were intoxicated.

Name of Creditor:
Address:
Account number: Date debt incurred:
Amount owed: Type of debt:
Name of Creditor:
Address:
Account number: Date debt incurred:
Amount owed: Type of debt:
Name of Creditor:
Address:
Account number: Date debt incurred:
Amount owed: Type of debt:

Name of Creditor:	
Address:	
Account number:	Date debt incurred:
Amount owed:	Type of debt:

UNSECURED DEBTS

State the name, mailing address, including zip code, and last four digits of any account number, of all entities holding unsecured claims.

Name of Creditor:	
Address:	
Account number:	Date debt incurred:
Amount owed:	What debt was for:

Name of Creditor:	
Address:	
Account number:	Date debt incurred:
Amount owed:	What debt was for:

Name of Creditor:	
Address:	
Account number:	Date debt incurred:
Amount owed:	What debt was for:

Name of Creditor:	
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Amount owed:	What debt was for:

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Amount owed:	What debt was for:

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Amount owed:	What debt was for:

Name of Creditor:	
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Name of Creditor:	
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Account number:	Date debt incurred:
Amount owed:	What debt was for:
Name of Creditor:	
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Account number:	Date debt incurred:
Amount owed:	What debt was for:
Name of Creditor:	
Address:	
Account number:	Date debt incurred:
Amount owed:	What debt was for:

LEASES AND CONTRACTS List all leases and contracts below, include timeshare interests.

Describe the lease or contract and what it is for:

Name and address of other party to contract:

CO-DEBTORS

List all parties below who are also liable for debts listed. Include all guarantors and co-signers. If you resided in a community property state (including Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington or Wisconsin) within the past 8 years and were married, list the spouse's name below as a "co-debtor" and include all names co-debtor used in the last 8 years.

Name and address of co-debtor: _

Name and address of creditor

EMPLOYMENT INFORMATION

Marital status: List the ages of your dependents and how they are related to you:

Do these dependents reside with you?

Occupation and name of employer:

How long employed? Address of employer:

Spouse Occupation and name of employer:

How long employed? Address of employer:

If you expect an increase or decrease in your income in the next year describe:

Do you receive Social Security? If yes, how much per month?

AVERAGE INCOME OVER PAST 6 MONTHS

Please provide copies/evidence of the following income sources received in the past 6 months:

1. Gross wages, tips bonuses salary and commissions:
2. Income/expenses from operation of business, profession or farm:
3. Rent and real property income:
4. Income from interest, dividends and royalties:
6. Income from pension and retirement (don't include Social Security):
7. Income from child support or spousal support:
8. Average amount from any other person or entity that regularly pays your or your dependent's household expenses:
9. Income from Unemployment Compensation:
10. Income from all other sources:

MONTHLY EXPENSES

List your monthly expenses below. If you and your spouse are filing bankruptcy together but do not live together attach a separate list of spouse's monthly expenses.

Rent or mortgage (include lot rented for mobile home)	\$
Are real estate taxes included in mortgage? If not, list here	\$
Is property insurance included in mortgage? If not list here	\$

Electricity and heating fuel	\$
Water and sewer	\$
Telephone	\$
Other utilities (specify)	\$
Home maintenance (repairs and upkeep)	\$
Food	\$
Clothing	\$
Laundry and dry cleaning	\$
Medical and dental	\$
Transportation (not including car payments)	\$
Recreation, clubs, entertainment, newspapers, magazines	\$
Charitable contributions	\$
Insurance (not deducted from wages or included in mortgage payments)	\$
Homeowners or renters	\$
Life	\$
Health	\$
Auto	\$
Other insurance (specify)	\$
Taxes (not deducted from wages or included in mortgage)(specify type of taxes	\$
Alimony, maintenance, support you pay	\$
Support paid to additional dependents not living with you	\$
Installment payments (auto)	\$
Other installment payments (specify)	\$
Expenses from business, profession, farm operation	\$
Other expenses (specify)	\$

If you expect an increase or decrease in any of the above categories in the next year describe

STATEMENT OF FINANCIAL AFFAIRS

1. Gross income from employment, trade, profession, or business (including all part-time activities as an employee or in an independent trade or business):

2010	you:	source of income	spouse:	source of income
2011	you:	source of income	spouse:	source of income
2012	you:	source of income	spouse:	source of income
	(year to date)			

case number

4b. List all property that has been attached, garnished or seized within the last year

Name and address of creditor date of seizure description/value of property

Name and address of creditor date of seizure description/value of property

5. List all property that has been repossessed, foreclosed upon, transferred through a deed in lieu of foreclosure or returned to the seller in the last year

Name and address of creditor date description/value of property

Name and address of creditor date description/value of property

6. Describe any property you have assigned to creditors in the last 120 days

Name and address of creditor date terms of assignment

6b. List all property which has been in the hands of a custodian, receiver, or court-appointed official within the last year

Name and address of custodian name and location of court date description/value of property
of custodian case title and number

7. List all gifts or charitable contribution made in the last year (except usual and ordinary gifts to family less than \$200.00 in value per person and charitable contributions totaling less than \$100.00 per recipient)

Name and address relationship, if any date description/value

12. List all safe deposit boxes or depositories in which you have held cash, securities or other valuables in the last year.

<u>Name and address</u> <u>bank or depository</u>	<u>names of persons with access</u> <u>and address</u>	<u>contents</u>	<u>date of</u> <u>transfer or surrender</u>
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13. List all setoffs made by any creditor, including a bank, against a debt or deposit of yours within the last 90 days.

<u>Name and address</u>	<u>date</u>	<u>amount of set off</u>
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14. List all property owned by another person that you hold or control.

<u>Name and address</u>	<u>description/value of property</u>	<u>location of property</u>
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15. If you have moved within the last three years, list all other address you have occupied and vacated.

<u>Address</u>	<u>name used</u>	<u>dates of occupancy</u>
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<u>Address</u>	<u>name used</u>	<u>dates of occupancy</u>
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<u>Address</u>	<u>name used</u>	<u>dates of occupancy</u>
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<u>Address</u>	<u>name used</u>	<u>dates of occupancy</u>
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16. If you have 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 past 8 years, identify the name of your spouse and of any former spouse who resides or resided with you in the community property state.

17. Environmental Information. For the purposes 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.

"Site" means any locations, facility, or property as defined under any Environmental Law, whether or not presently or formerly owned or operated by you, including but not limited to, disposal sites.

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

17a. List the name and address of every site for which you have received notice in writing by a governmental unit that it you may be liable or potentially liable under or in violation of an Environmental Law. Indicate the government unit, the date of the notice, and if known, the Environmental Law.

Site Name and Address	Name and address of governmental unit	Date of notice	Environmental Law
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17b. List the name and address of every site for which you provided notice to a governmental until of a release of Hazardous Material. Indicate the governmental until to which notice was sent and the date of the notice.

Site Name and Address	Name and address of governmental unit	Date of notice	Environmental Law
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17c. 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.

Name and address of governmental unit	Docket number	Status or disposition
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18a. **If you have been in business in the last six years, as defined below, there are additional questions you must answer. Contact our office and request a business statement.**

"In business." A debtor is "in business" for the purpose of this form if the debtor is a corporation or partnership. An individual debtor is "in business" for the purpose of this form if the debtor is or has been, within six years immediately preceding the filing of this bankruptcy case, any of the following: an officer, director, managing executive, or owner of 5 percent or more of the voting or equity securities of a corporation; a partner, other than a limited partner, of a partnership; a sole proprietor or self-employed full-time or part-time. An individual debtor also may be "in business" for the purpose of this form if the debtor engages in a trade, business, or other activity, other than as an employee, to supplement income from the debtor's primary employment.

Individuals list the names, addresses, taxpayer I.D. numbers, nature of the business, and the beginning and ending dates of all business in which you were an officer, director, partner, or managing executive of a corporation; a partnership, a sole-proprietor, or self employed within the past six years.

If you are or were a partnership, list the names addresses, taxpayer ID numbers, nature of the business, and the beginning and ending dates of all business in which you were a partner or owned 5% or more of the voting or equity securities, within the past six years.

If you are or were a corporation list the names addresses, taxpayer ID numbers, nature of the business, and the beginning and ending dates of all business in which you were a partner or owned 5% or more of the voting or equity securities, within the past six years.

Please answer yes or no: I (we) have been in business as defined above within the past 6 years:

Prior Bankruptcies

If you have filed bankruptcy within the past 8 years give date, case number and location where that case was filed:

Pending Bankruptcies

If your spouse, partner or affiliate has a bankruptcy pending give person's name, case number, filing date and the relationship to you:

Please answer yes or no to the following:

My landlord has a judgment against me to take possession of my residence.

PLEASE REVIEW YOUR WORKSHEET. IF IT IS INCOMPLETE YOUR PREPARATION WILL BE DELAYED. IF YOU DO NOT ANSWER ALL QUESTIONS WE WILL HAVE TO RETURN THE WORKSHEET TO YOU. PLEASE BE SURE ALL QUESTIONS ARE ANSWERED. IF A QUESTION DOES NOT PERTAIN TO YOUR SITUATION PUT "NONE" DO NOT LEAVE ANY QUESTIONS UNANSWERED.