## Questionnaire

DEBTOR			
First name	Middle name	Last name	
SSN (Last 4)	Date of birth (MM/DD/YYYY)		
Marital status	Household size		
SPOUSE (if filing jointly)			
First name	Middle name	Last name	
SSN (Last 4)	Date of birth (MM/DD/YYYY)		
Contact Information			
Mobile phone			
Home phone			
Email 1			
Email 2			
ADDRESS 1		Address Type	Ownership Status
City	County	State	Zip
ADDRESS 2		Address Type	Ownership Status
City	County	State	Zip

Addresses (anywhere you've lived in the last 3 years)			Address Type		Ownership status		
ADDRESS 3	ADDRESS 3						
				Move in date		Мо	ve out date
City	County			State		Zip	)
ADDRESS More							
				Move in da	ate	Мо	ve out date
Dependents - Name(s)		Relationship		Age	Does the deper	nder	nt live with you? yes/no
Former Spouse (Community prope	rty state)						
Name	Address						
City	State			Zip			
Property							
Real Property Owned				Type of Property			
Address							
		If Other:					
City	State			County			Zip
			<del></del>				

Mortgage					
Creditor name			Balance		
Creditor address			Monthly payment		
			\$		
State	Zip		Includes taxes?	Includes insurance	
Vehicles					
Year	Make		Model	Trim	
Mileage	Condition		Value		
			\$		
Payment					
Creditor name			Balance		
Creditor address			Monthly payment		
City	State		Zip		
Personal Items					
Electronics				Total estimated value of all items	
				\$	
Household (list all items)				Total estimated value of all items	
				\$	

Jewelry (list all items)			Total estimated value of all items
			\$
			Ψ
			Total estimated
Clothing	 		value of all items
			\$
Pets			Total estimated value of all items
			\$
Sports & Hobby Equipment			Total estimated value of all items
	,		\$
Firearms			Total estimated value of all items
			\$
Other			Total estimated value of all items
			\$
Money & Accounts			<u> </u>
Cash on hand		Balance	\$
Savings			
Name of financial Institution			
Account Number (last 4)		Balance	\$
		Dalance	Ť

Account info if closed	Was this account closed within 1 year?		Balance before closing	Date closed	
Checking					
Name of financial Institution					
Account Number (last 4)			Balance	\$	
Account info if closed	Was this account close	ed within 1 year?	Balance before closing	Date closed	
Money Market					
Name of financial Institution					
Account Number (last 4)			Balance	\$	
Account info if closed	Was this account close	d within 1 year?	Balance before closing	Date closed	
Businesses List any busines	ss you owned or had a c	onnection to with	in the last 4 years		
Name of business		Location of busi	ness	Taxpayer ID	
Role of Debtor	Nature of business (Inc, L	LC, LLP, etc)	From (Dates of Operation)	To (Dates of Operation)	
Sole Proprietor or Self Employed	Current		Name of Accountant or Bookkeeper		
Did you give a financial statement to	anyone about your business in	the last two years? I	f yes, add the institution or bookk	eeper's information below	
Accountant or Institution	Address				

Interests			Value
Stock			\$
Bond			\$
Mutual Fund			\$
Whole Life Ins			\$
Term Life			\$
Annuity			\$
IRA			\$
Pension			\$
Government Pension			\$
Keogh		_	\$
401k			\$
Farm / Livestock (list all)			Total estimated value of all items
			\$
Other Farm Property			Total estimated value of all items
			\$

Holding Property for Another Person								
Owner of Property 1		Location	n of Property		Descrip	tion	Value	
							\$	
Owner address								
Owner of Property 2							Value	
							\$	
Owner address								
Employment Income							•	
Debtor								
Company name		Compa	ny Address					
Occupation Length of employment					Pay period			
Spouse								
Company name		Compa	ny Address					
Occupation					Length	th of employment Pay p		eriod
Other Income								
	\$			\$				\$
	\$			\$				\$
	\$			\$				\$
	\$			\$ \$			\$	
Gross Yearly Income								•
Debtor			Employment Wages/Bu	sines	s			
Current Year (YTD)		Last Ye	ar		Year Before			
\$		\$	\$			\$		

Spouse			
Current Year (YTD)	Last Year	Year Before	
\$	\$	\$	
Gross Yearly Income (Other	er Sources)		
Debtor	\$		\$
Current Year (YTD)	Last Year	Year Before	
\$	\$	\$	
Monthly Expenses			
Mortgage/Rent	Home insurance	Condo / HOA fees	Additional fees
\$	\$	\$	\$
2nd Mortgage	Property taxes	Repairs / Upkeep	
\$	\$	\$	
Electric	Phone / cable / internet	Cell phone	Other utility
\$	\$	\$	\$
Heat / gas	Water / sewer / trash	Additional phone service	Other installment payment
\$	\$	\$	\$
Groceries	Clothing	Hair cuts	Personal care products
\$	\$	\$	\$
Cleaning / laundry	Recreation		
\$	\$		
Medical	Dental	Vision	Prescriptions
\$	\$	\$	\$
Tax payments	Specify taxes	Life insurance	
\$		\$	
Other insurance	Specify insurance		
\$			
Car insurance	Oil changes / maintenance		
\$	\$		

Gas	Other transportation expenses	Charity / tithes	
\$	\$	\$	
Daycare / babysitter	Contributions to other family members	Other expenses	Specify
\$	\$	\$	
Children's education expenses	Cost of care for ill, elderly, or disabled	\$	
\$	\$	\$	
Education expenses for work	Child support/ alimony	\$	
\$	\$	\$	

Creditors			
Creditor name	Account Number	Balance	Type of debt
Creditor address	Monthly payment	Date opened	
If you've paid this creditor with	in the last 90 days, please add the	last 3 dates and payments t	pelow.
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$
Creditor name	Account Number	Balance	Type of debt
Creditor address	Monthly payment	Date opened	
If you've paid this creditor with	in the last 90 days, please add the	last 3 dates and payments t	pelow.
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$
Creditor name	Account Number	Balance	Type of debt
Creditor address	Monthly payment	Date opened	
			•
If you've paid this creditor with	in the last 90 days, please add the	last 3 dates and payments b	pelow.
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$

Creditor name	Account Number	Balance	Type of debt
Creditor address	Monthly payment	Date opened	
		,	,
If you've paid this creditor within	n the last 90 days, please add the	last 3 dates and payments below	<i>I</i> .
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$
Creditor name	Account Number	Balance	Type of debt
Creditor address	Monthly payment	Date opened	
		·	
If you've paid this creditor within	n the last 90 days, please add the	last 3 dates and payments below	1.
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$
Creditor name	Account Number	Balance	Type of debt
			Credit card/
Creditor address	Monthly payment	Date opened	
If you've paid this creditor within	n the last 90 days, please add the	last 3 dates and payments below	<i>1</i> .
Last Payment Date	Recent Payment Dates	Additional Payment	Total Amount Paid
			\$
			\$
			\$

Creditor name	Account Number	Balance		Type of debt
Creditor address	Monthly payment	Date ope	ened	
		•		
If you've paid this creditor within	n the last 90 days, please add the l	ast 3 dates and pay	yments below.	
Last Payment Date	Recent Payment Dates	Additional F	Payment	Total Amount Paid
				\$
				\$
				\$
Insiders		+		•
	I for bankruptcy, did you make a paroperty that benefited an insider?	yment to anyone w	vho was an ins	ider or did you
Payment made to insider (within	n 1 year)			
Payment made to creditor for b	enefit of an insider (within 1 year)			
Insider name	First Date of payment	Amount Pai	id	
		\$		
Insider address	Second date of payment			
		\$		
	Third date of payment			
		\$		
		Amount Stil	II Owing	
Reason for Payments (include creditor, if applicable)		\$		

Lawsuits						
Court Name	Date Filed	If applicable, choose type of suit	Nature of Case			
Address			Date of Action			
			Creditor (if this action was filed			
Case Caption	Case Number		by a creditor)			
Case Status						
Have you paid an individual cre	ditor a total of <b>\$600</b> or more withirthe las	t <b>90 days</b> ?				
Any property repossessed, foreclosed, garnished, attached, seized, or levied within the past <b>1 year</b> ?						
Within 90 days before you filed for bankruptcy, did any creditor, including a bank or financial institution, <b>setoff</b> any amounts from your accounts or refuse to make a payment because you owed a debt? If yes, how much and when						
Within 1 year before you filed bankruptcy, was any of your property in the possession of an assignee for the benefit of creditors, a court-appointed receiver, a custodian, or another official?						
Within 1 year before you filed for bankruptcy, did you or anyone else acting on your behalf pay or transfer any property to anyone who promised to help you deal with your creditors or to make payments to your creditors?						
Has any governmental unit notified you that you may be liable or potentially liable under or in violation of an environmental law? If yes, please describe.						
Have you notified any governmental unit of any release of hazardous material? If yes, please describe.						
Have you been a party in any judicial or administrative proceeding under any environmental law? If yes, please describe.						

## Suggested documents to upload:

- 1. Pay stubs (past 6 months). If self-employed, need monthly profit & loss statements; If receiving non-employment income (unemployment, child support, Social Security, retirement)
- 2. Income tax returns, both state and federal (past 2 years)
- 3. Home documents such as a mortgage statement, recorded mortgage, property tax bill
- 4. Vehicle documents such title, proof of insurance, lender statement
- 5. Driver's license and social security card
- 6. Bank statements (past 4 months)
- Medical bills
- 8. Leases or rental agreements
- 9. Credit card statements and tax bills
- 10. Most recent credit report