

Date: \_\_\_\_\_

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

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

Mailing address, if different: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

Lived at address for more than 6 months? \_\_\_\_\_

Spouse name: \_\_\_\_\_

Spouse address: \_\_\_\_\_

Spouse social security number: \_\_\_\_\_

Filed bankruptcy in last 8 years? \_\_\_\_\_

Do you own property that is a hazard? \_\_\_\_\_

Are you a tenant? \_\_\_\_\_

Does landlord have judgment against you: \_\_\_\_\_

**Property**

1. Cash: \_\_\_\_\_

2. Checking/Savings: \_\_\_\_\_

3. Security Deposits: \_\_\_\_\_

4. Household goods: \_\_\_\_\_

5. Books, art, collectibles: \_\_\_\_\_

6. Clothing: \_\_\_\_\_

7. Furs and jewelry: \_\_\_\_\_

8. Sports, hobby, firearms: \_\_\_\_\_

9. Insurance policies: \_\_\_\_\_

10. Annuities: \_\_\_\_\_

11. Education IRA: \_\_\_\_\_

12. Pension or Profit sharing plan: \_\_\_\_\_

13. Stocks: \_\_\_\_\_

14. Partnerships: \_\_\_\_\_

15. Bonds: \_\_\_\_\_

16. Accounts receivable: \_\_\_\_\_

17. Alimony/Family support: \_\_\_\_\_

18. Tax refunds: \_\_\_\_\_

19. Future interests or life estates: \_\_\_\_\_

20. Interests in estates or trusts: \_\_\_\_\_

21. Other claims or counter-claims: \_\_\_\_\_

22. Patents/copyrights: \_\_\_\_\_

23. Licenses: \_\_\_\_\_

24. Customer lists: \_\_\_\_\_

25. Automobiles, trucks, trailers \_\_\_\_\_

26. Boats/motors: \_\_\_\_\_

27. Aircraft: \_\_\_\_\_

28. Office Equipments: \_\_\_\_\_

29. Machinery/fixtures: \_\_\_\_\_

30. Inventory: \_\_\_\_\_

31. Animals: \_\_\_\_\_

32. Crops: \_\_\_\_\_

33. Farming equipment: \_\_\_\_\_

34. Farm supplies: \_\_\_\_\_

35. Other property not listed: \_\_\_\_\_

**House**

What is it worth: \$ \_\_\_\_\_

Mortgage balance: \$ \_\_\_\_\_

Monthly payments: \$ \_\_\_\_\_

Keep and continue making payments or surrender it  
and not owe anything?: \_\_\_\_\_

**Cars**

1: Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Miles \_\_\_\_\_

Keep and continue to pay or surrender? \_\_\_\_\_

2: Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Miles \_\_\_\_\_

Keep and continue to pay or surrender? \_\_\_\_\_

**Partial List of Exemptions**

Homestead: \$15,000.00 equity in home

Pension Plan, IRA, 401(k) - no limit

Up to \$2,400.00 equity in one vehicle

\$4,000.00 general exemptions

Child Support and Maintenance - no limit

Personal Injury - \$15,000.00

Social Security, Unemployment - no limit

**Gross Income**

	<u>You</u>	<u>Spouse</u>
Last 6 full months: \$	_____	\$: _____
2024 to date: \$	_____	\$: _____
2023: \$	_____	\$: _____
2022: \$	_____	\$: _____

Our office will order a credit report which will have some of your creditors on it. It is your obligation to review the list and furnish the names and addresses of missing creditors and lawsuits.

After filing the trustee will have a telephone hearing a month later. Before the hearing she will want 2 years tax returns, 90 days bank statements and 60 days of paystubs.