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**BANKRUPTCY**

BANKRUPTCY WORKSHEET

Have you ever filed for bankruptcy before? \_\_\_\_\_ if yes, complete the following:

Chapter filed \_\_\_\_\_ Date Filed \_\_\_\_\_ District filed in \_\_\_\_\_

Judge \_\_\_\_\_ Dismissed \_\_\_\_\_ Discharged \_\_\_\_\_

Your Full (Legal) Name \_\_\_\_\_

List all names you have used in the last 8 years, including dba's \_\_\_\_\_

\_\_\_\_\_

Your social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Full (Legal) name of Spouse (if filing jointly) \_\_\_\_\_

List all names you have used in the last 8 years, including dba's \_\_\_\_\_

\_\_\_\_\_

Your social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Current address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mailing Address, if different

\_\_\_\_\_

\_\_\_\_\_

Phone(home) \_\_\_\_\_ Cell(s) \_\_\_\_\_

Phone (other) \_\_\_\_\_

email Addresses: \_\_\_\_\_

\_\_\_\_\_

Names and ages of dependents and their relationship to you:

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Do they reside with you? \_\_\_\_\_

REAL ESTATE

List all real property in which you have an interest, including property you own or are buying, property owned as co-tenant, community property, or property in which you have a life estate.

Property address \_\_\_\_\_  
\_\_\_\_\_

Current value \_\_\_\_\_ Do you intend to keep this property? \_\_\_\_\_

Payments current? \_\_\_\_\_

PERSONAL PROPERTY OWNERSHIP

List all personal property that you own below. Do not include leased property in this section. If you have no property in a category, write "none." If property owned by you is being held by someone else, list that person's name and address under Description/Location. Attach additional sheets as needed or use the back of this sheet.

TYPE OF PROPERTY	DESCRIPTION/LOCATION	VALUE
1. Cash on hand	_____	\$ _____
2. Checking, savings accts	_____	\$ _____
All Financial accounts, including	_____	\$ _____
Certificates of Deposit, brokerage	_____	\$ _____
accounts, Credit Unions, etc	_____	\$ _____
3. Security deposits with Utilities, Phone companies, Landlords, other	_____ _____	\$ _____ \$ _____
4. Interest in Insurance Policies (Name of Co & Surrender value)	_____ _____	\$ _____
5. Annuities (Itemize)	_____	\$ _____
6. Interest in Educational IRA or Qualified State Tuition Plan	_____	\$ _____
7. Interest In IRA, ERISA, 401(k) or other pension or profit sharing plans	_____	\$ _____
8. Stock & Interests in incorporated or unincorporated businesses	_____	\$ _____

TYPE OF PROPERTY	DESCRIPTION/LOCATION	VALUE
9. Interests in Partnerships or joint ventures	_____	\$ _____
10. Government or Corp. Bonds	_____	\$ _____
11. Alimony, maintenance, support and property settlements you are or may be entitled to	_____	\$ _____

12. Other liquidated debts owed to you, including tax refunds \_\_\_\_\_ \$ \_\_\_\_\_

13. Equitable or future interest Life estates & rights & powers exercisable for your benefit \_\_\_\_\_ \$ \_\_\_\_\_

14. Contingent & Non-Contingent interests in the estate of decedent death benefit plan, or trust \_\_\_\_\_ \$ \_\_\_\_\_

14 a. Inheritance or expected Inheritance \_\_\_\_\_ \$ \_\_\_\_\_

15. Other contingent and unliquidated claims of every nature, including claims and counterclaims \_\_\_\_\_ \$ \_\_\_\_\_

16. Patents, copyrights and other intellectual Properties \_\_\_\_\_ \$ \_\_\_\_\_

17. Licenses, Franchises, other general intangibles \_\_\_\_\_ \$ \_\_\_\_\_

18. Customer lists or other items containing personally identifiable information \_\_\_\_\_ \$ \_\_\_\_\_

19. Household goods & Furnishings Including audio, video, computer \_\_\_\_\_ \$ \_\_\_\_\_

20. Books, pictures, art objects, antiques, collections, etc \_\_\_\_\_ \$ \_\_\_\_\_

21. Wearing apparel \_\_\_\_\_ \$ \_\_\_\_\_

22. Furs & Jewelry \_\_\_\_\_ \$ \_\_\_\_\_

TYPE OF PROPERTY                      DESCRIPTION/LOCATION                      VALUE

23. Firearms/Sports Equip other hobby Equipment \_\_\_\_\_ \$ \_\_\_\_\_

24. Autos, trailers, other vehicles	_____	\$_____
25. Boats, Motors, Accessories	_____	\$_____
26. Aircraft & Accessories	_____	\$_____
27. Office equipment, furnishings	_____	\$_____
28. Machinery, fixtures, equipment used in business (including farming)	_____	\$_____
29. Inventory (business)	_____	\$_____
30. Livestock/breeding animals	_____	\$_____
31. Crops harvested/growing	_____	\$_____
32. All other property not listed	_____	\$_____

SECURED DEBTS

List name, full addresses, and last 4 digits of account number of all creditors holding claims secured by your property. Include judgments, liens, garnishments, statutory liens, auto loans, mortgages, deeds of trust and other security interests. Attach additional sheets as needed or use the back of this sheet.

1) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
 \_\_\_\_\_

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

Account #: \_\_\_\_\_ Type  
of Lien \_\_\_\_\_  
 Do you wish to keep and pay debt? \_\_\_\_\_

2) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

Account #: \_\_\_\_\_

Type of Lien \_\_\_\_\_

Do you wish to keep and pay debt? \_\_\_\_\_

3) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

Account #: \_\_\_\_\_ Type  
of Lien \_\_\_\_\_

Do you wish to keep and pay debt? \_\_\_\_\_

4) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

Account #: \_\_\_\_\_ Type  
of Lien \_\_\_\_\_

Do you wish to keep and pay debt? \_\_\_\_\_

PRIORITY DEBTS

List below all of the following types of debt: Domestic Support obligations, all Federal, state county or other taxes owed. Wages or salaries you owe to others; monies owed to employees' benefit plans, deposits individuals have given you for purchase, lease or rental of property; claims of farmers and fishermen, and claims against you for personal injury or death while you were intoxicated. Attach additional sheets as needed or use the back of this sheet.

1) Account #: \_\_\_\_\_  
Type of Lien \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

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

2) Account #: \_\_\_\_\_  
Type of Lien \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

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

3) Account #: \_\_\_\_\_ Type of  
Lien \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_



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

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

4) Account #: \_\_\_\_\_  
Type of Lien \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

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

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

**UNSECURED DEBTS**

List below ALL other debts. Give full addresses and the last 4 digits of the account numbers. If it is a collection agency, note original creditor also. Attach additional sheets as needed or use the back of this sheet.

1) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

2) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

3) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

4) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

5) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

6) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_  
Type: \_\_\_\_\_

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

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

7) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

Type: \_\_\_\_\_

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

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

8) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

Type: \_\_\_\_\_

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

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

9) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

Type: \_\_\_\_\_

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

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

10) Date Incurred: \_\_\_\_\_ Amount of Debt: \$ \_\_\_\_\_

Type: \_\_\_\_\_

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

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

**LEASES AND CONTRACTS**

List all unexpired leases and contracts, including timeshares. Attach additional sheets as needed or use the back of this sheet.

Description/purpose \_\_\_\_\_

\_\_\_\_\_  
Name and address of other  
party(ies) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CO-DEBTORS

List below all parties who are also liable for debts listed. Include all guarantors and co-signers. If you resided in a community property state (AK, AZ,CA,ID,LA,NV,NM,TX,WA,WI, or PUERTO RICO within the last 8 years, and were married, list the spouse's name and address. Include all names and trade names the co-debtor has used during the 8 year period. Attach additional sheets as needed or use the back of this sheet.

Name &  
Address \_\_\_\_\_  
\_\_\_\_\_

Name &  
Address \_\_\_\_\_  
\_\_\_\_\_

CURRENT INCOME

Marital Status \_\_\_\_\_

Occupation \_\_\_\_\_

Name & Address of employer \_\_\_\_\_  
\_\_\_\_\_

Length of employment \_\_\_\_\_

Spouse's Occupation \_\_\_\_\_

Name & Address of employer \_\_\_\_\_

Length of employment \_\_\_\_\_

List below your average **monthly** income. Use gross figures.

You

Regular Monthly Income \_\_\_\_\_  
Overtime \_\_\_\_\_  
Less p/r deductions- taxes \_\_\_\_\_  
Less Insurance \_\_\_\_\_  
Less Union dues \_\_\_\_\_  
Less Other (specify) \_\_\_\_\_

\_\_\_\_\_  
Monthly net \_\_\_\_\_

Spouse

Regular Monthly Income \_\_\_\_\_  
Overtime \_\_\_\_\_  
Less p/r deductions-taxes \_\_\_\_\_  
Less Insurance \_\_\_\_\_  
Less Union dues \_\_\_\_\_  
Less Other (specify) \_\_\_\_\_

\_\_\_\_\_  
Monthly net \_\_\_\_\_

Income other than from employment, trade, profession or operation of business you have received in the last TWO years:

Year \_\_\_\_\_ Amount \_\_\_\_\_ Source \_\_\_\_\_  
\_\_\_\_\_

OTHER INCOME (Monthly)

You

Income from business,  
Profession or farm \_\_\_\_\_  
Income from Real Property \_\_\_\_\_  
Income from Interest/Div \_\_\_\_\_  
Alimony, support \_\_\_\_\_  
Social Security or Gov assist \_\_\_\_\_  
Type of Assistance \_\_\_\_\_  
Pension or retirement \_\_\_\_\_  
Other Income (Specify) \_\_\_\_\_

Spouse

Income from business,  
Profession or farm \_\_\_\_\_  
Income from Real Property \_\_\_\_\_  
Income from Interest/Div \_\_\_\_\_  
Alimony, support \_\_\_\_\_  
Social Security or Gov assist \_\_\_\_\_  
Type of Assistance \_\_\_\_\_  
Pension or retirement \_\_\_\_\_  
Other Income (Specify) \_\_\_\_\_

MONTHLY EXPENSES

List your monthly expenses below. If you and your spouse are filing together but maintain separate residences, attach a separate sheet for spouse's expenses.

Rent, mortgage, mobile lot rental	_____
Payments on 2 <sup>nd</sup> Mortgage or HELOC	_____
Real estate taxes if NOT included above	_____
Property/homeowner/rental Insurance (if NOT Incl)	_____
Electric and Heating fuel	_____
Water and Sewer	_____
Telephone/cable/internet	_____
Other Utilities (specify)_____	_____
Home Repairs & Maintenance	_____
Food	_____
Personal Care	_____
Clothing	_____
Laundry & Dry cleaning	_____
Out-of-pocket medical and dental (Co-pays)	_____
Transportation (NOT car payments)	_____
Recreation (clubs, entertainment, newspapers)	_____
Charitable/Religious Contributions	_____
Insurance - Life or other not deducted from payroll	_____
Alimony or support paid by You	_____
Child or other support paid by You	_____
Childcare paid by you	_____
Installment payments (vehicle loan)	_____
Additional vehicle loan	_____
Other Installment payments (specify)	_____
_____	_____
Business or farm expenses	_____
Other (specify)_____	_____

## **LIST OF DOCUMENTS NEEDED TO PREPARE AND FILE YOUR BANKRUPTCY**

### **Previous Bankruptcy Filing Information:**

\_\_\_ Copy of your previous discharge notice.

### **Pre-Filing Credit Counseling:**

\_\_\_ Original of Pre-Filing Credit Counseling Certificate of Completion.

### **Income:**

- \_\_\_ Copies of Pay Stubs for last 6 months
- \_\_\_ Copies of IRS 1040 Income Tax returns and W-2s for last 2 years.
- \_\_\_ Social security notification documents (if receiving SSI benefits)
- \_\_\_ State TANF (cash) or DSHS Foodstamps award letter(s)
- \_\_\_ Unemployment statements

### **Monthly Living Expenses:**

\_\_\_ Copies of all monthly living expense billing statements

### **Credit Report:**

\_\_\_ Copy of complete current credit reports from Transunion, Experian and Equifax (the reports must have full names and contact information for creditors)

### **Debts to be included in Bankruptcy:**

\_\_\_ Current copies of all creditor billing or invoice statements

### **Real Property Value:**

- \_\_\_ CMA/Appraisal report; or
- \_\_\_ Real estate agent comparative market analysis; or
- \_\_\_ TAV (tax assessment value) notice from Snohomish, King or Skagit County

### **Vehicles:**

- \_\_\_ Kelly Blue Book value; or
- \_\_\_ NADA value.

### **Bank Deposits:**

\_\_\_ Current bank statements for the last 2 months

**Security deposits:**

\_\_\_ Copy of all agreements (rental/lease, utility, etc.)

**Household Goods & Furnishings:**

\_\_\_ Personal property self-appraisal or if applicable, professional appraisal

**Wearing apparel:**

\_\_\_ Your personal self-appraisal for the value of your/your families' clothing

**Jewelry:**

\_\_\_ Jewelers appraisals (if applicable) or your personal self-appraisal

**Life or Disability Insurance Policies:**

\_\_\_ Copies of all Whole Life policies

**Annuities:**

\_\_\_ Copies of all contracts

**Stocks/Bonds/Options:**

\_\_\_ All account statements for the past 2 months

**Pension/Retirement:**

\_\_\_ Copies of all employment benefits statements for the past 2 months

**Accounts Receivables:**

\_\_\_ Copies of ledger books

**Alimony, maintenance, child support, property settlement:**

\_\_\_ Copies of dissolution of marriage documents

**Office Equipment, furnishings, supplies:**

\_\_\_ List of inventory

\_\_\_ Contact information for person(s) supervising and performing the inventory



**Animals:**

\_\_\_ Registration documents (if AKC, AQHA, etc. registered)

**Farming Equipment:**

\_\_\_ Current appraisals or your personal self-appraisal

**Personal Injury Claims/Lawsuits:**

\_\_\_ Name, address and phone number of Attorney assisting in claim

\_\_\_ Name, address and phone number of Insurance claims adjustor assigned to claim