
Client Name: _____

Petition Questionnaire

All questions must be answered as completely and accurately as possible. These answers go directly on your petition and we cannot file your case if these are incomplete. If you are unsure of something we will discuss it in your next appointment. You must answer everything truthfully and disclose all assets (all property that you own or have an interest in). If you fail to disclose an asset, you could lose it to the bankruptcy.

Primary Current Employment

	Debtor's Employment	Spouse's Employment
Name of employer		
Address of employer		
Phone # of employer		
Job Title		
Length of employment		

Additional Current Employment

	Debtor's Employment	Spouse's Employment
Name of employer		
Address of employer		
Phone # of employer		
Job Title		
Length of employment		

Income from Employment

	Debtor	Spouse
2012 YTD	\$	\$
2011	\$	\$
2010	\$	\$

Income from ANY other source in the past **three years** (i.e. social security; unemployment; child support; tips or cash jobs; inheritance). This will also include a one-time 401(k) or IRA withdraw or income from the sale of property.

Source	Debtor	Spouse
2012 YTD Social Security	\$	\$
2012 YTD Child Support	\$	\$
2012 YTD Unemployment	\$	\$
2012 YTD Pension Income	\$	\$
2012 YTD Other	\$	\$
2011 Social Security	\$	\$
2011 Child Support	\$	\$
2011 Unemployment	\$	\$
2011 Pension Income	\$	\$
2011 Other	\$	\$
2010 Social Security	\$	\$
2010 Child Support	\$	\$
2010 Unemployment	\$	\$
2010 Pension Income	\$	\$
2010 Other	\$	\$

Payments on Debt

Have you paid any individual creditors over \$600 in the last 90 days?

YES NO

Creditor Name _____

Creditor Address _____

Amount Paid \$ _____ Date: _____

Creditor Name _____

Creditor Address _____

Amount Paid \$ _____ Date: _____

Creditor Name _____

Creditor Address _____

Amount Paid \$ _____ Date: _____

Creditor Name _____
Creditor Address _____
Amount Paid \$ _____ Date: _____

Have you paid any friends or family members over \$600 in the last 2 years?
YES NO

Name _____
Address _____
Amount Paid \$ _____ Date: _____

Name _____
Address _____
Amount Paid \$ _____ Date: _____

Name _____
Address _____
Amount Paid \$ _____ Date: _____

Name _____
Address _____
Amount Paid \$ _____ Date: _____

1. Lawsuits; garnishments and seizures:

a. Have you been involved in any lawsuits in the past year? YES NO

i. Cause Number: _____

ii. Case Name: _____

iii. Status: _____

b. Have any creditors attached, garnished or seized any property in the past year? YES NO

Creditor _____ Date taken _____

Property _____ Value _____

Creditor _____ Date taken _____

Property _____ Value _____

2. Have you had any repossessions, foreclosures, or property returned to creditors in the past year?

YES NO

Creditor _____ Date taken _____

Property _____ Value _____

Creditor _____ Date taken _____

- Property _____ Value _____
3. Have you made any gifts or charitable contributions in the past year? **YES NO**
Average Monthly Contribution \$ _____
To Whom _____
4. Have you had any losses from fire, theft, or gambling in the past year? **YES NO**
Cause _____ Date lost _____
Property _____ Value _____
5. Have you paid anyone for consultation concerning your debt in the past year?
YES NO To: _____
6. Transfers
- a. Have you transferred any property, money or goods to relatives or cosigners, or paid creditors for the benefit of relatives or cosigners? **YES NO**
- b. Have you transferred any property within the last year? **YES NO**
7. Were there any financial accounts held in your name or for your benefit that were closed or transferred in the last year (IRA, insurance policies, annuities, checking / savings accounts, etc.)? **YES NO**
8. Have you had a safe deposit box in the last year? **YES NO**
9. Has any money or property been taken by a creditor against any debt or deposit in the past 90 days?
YES NO
10. Joint property
- a. Is your name on the title to anyone's home, bank account, or any other property other than your own? **YES NO**
- b. Have you cosigned for anyone or has anyone cosigned for your and the debt is not paid in full?
YES NO
11. Have you lived elsewhere in the last three years? **YES NO**
- a. Address #1 _____ Dates:
(From) _____ (To) _____
- b. Address #1 _____ Dates:
(From) _____ (To) _____
12. Have you transferred or sold any real estate in the last 4 years? **YES NO**
- a. If Yes when? _____
- b. Profit \$ _____
13. Have you created a trust fund in the last 10 years? **YES NO**

Property:

1. Real estate – Homestead

Property address: _____

Tax Appraisal Value: _____

Name(s) on deed: _____

Would you like to keep or surrender this property? _____

First Mortgage Company: (please provide most recent statement)

Name: _____ Acct. No. _____

Mortgage Company Address: _____

Company Phone No: _____

Balance owed: \$ _____

Are you current: Yes No Number of Months Behind _____

Second Mortgage Company: (please provide most recent statement)

Name: _____ Acct. No. _____

Mortgage Company Address: _____

Company Phone No: _____

Balance owed: \$ _____

Are you current: Yes No Number of Months Behind _____

Additional or Rental Property

Property address: _____

Tax Appraisal Value: _____

Name(s) on deed: _____

Would you like to keep or surrender this property? _____

Are there renters living in the property? YES NO

Are the on a written lease? YES NO (Please provide a copy of the lease)

How much is the rent: \$ _____ Are they current? YES NO

First Mortgage Company: (please provide most recent statement)

Name: _____ Acct. No. _____

Mortgage Company Address: _____

Company Phone No: _____

Balance owed: \$ _____

Are you current: Yes No Number of Months Behind _____

Second Mortgage Company: (please provide most recent statement)

Name: _____ Acct. No. _____

Mortgage Company Address: _____

Company Phone No: _____

Balance owed: \$ _____

2. Cash in Hand Amount (including in your purse, wallet, car, under your mattress or in a safe or safe deposit box – anywhere you might have cash:
\$ _____

3. Bank Balances (Please provide 6 months bank statements for all accounts)

a. Checking Account

- i. Bank Name: _____
- ii. Last 4 Digits of Account #: _____
- iii. Balance: \$ _____

b. Saving Account

- i. Bank Name: _____
- ii. Last 4 Digits of Account #: _____
- iii. Balance: \$ _____

c. Other: _____

- i. Bank Name: _____
- ii. Last 4 Digits of Account #: _____
- iii. Balance: \$ _____

d. Other: _____

- i. Bank Name: _____
- ii. Last 4 Digits of Account #: _____
- iii. Balance: \$ _____

4. Life Insurance Policies (not through your employer): Please provide a copy of the policy.
- a. Company Name: _____
 - b. Term or Whole: _____
 - c. Cash Surrender Value: _____
 - d. Can you borrow from it? _____ How much? _____
5. Annuities
- a. Company Name: _____
 - b. Type: _____
 - c. Cash Surrender Value: _____
 - d. Can you borrow from it? _____ How much? _____
6. IRA, 401(K), or Pension
- a. Balance: \$ _____
7. Stock (Please provide an account statement)
- a. Company Name: _____
 - b. Position if any: _____
 - c. Shares if any: _____
 - d. Value: _____
8. Government or corporate Bonds
- a. Type: _____
 - b. Value: _____
9. Alimony or Child Support due to you
- a. Value: \$ _____
 - b. Is it collectable? YES NO
10. Expected Tax Return
- a. Value: \$ _____
11. Pending Lawsuits that you filed AGAINST someone
- a. Claim type: _____
 - b. Case Status: _____
 - c. Attorney name: _____
 - d. Attorney phone number: _____
12. Patents, copyrights or other intellectual property
- a. Value: \$ _____
13. Licenses, franchises, or other general intangibles
- a. Value: \$ _____
14. Automobiles, trucks, trailers, motorcycles or any other vehicles
- Make: _____ Model: _____ Year _____
- Finance Company: _____ Acct. No. _____
- Finance Company Address: _____
- Company Phone No: _____
- Balance owed: \$ _____ Approximate Value: _____
- Name(s) on title: _____
- Are you current: Yes No Number of Months Behind _____
- Would you like to keep or surrender this vehicle? _____

Make: _____ Model: _____ Year _____
Finance Company: _____ Acct. No. _____
Finance Company Address: _____
Company Phone No: _____
Balance owed: \$ _____ Approximate Value: _____
Name(s) on title: _____
Are you current: Yes No Number of Months Behind _____
Would you like to keep or surrender this vehicle? _____

Make: _____ Model: _____ Year _____
Finance Company: _____ Acct. No. _____
Finance Company Address: _____
Company Phone No: _____
Balance owed: \$ _____ Approximate Value: _____
Name(s) on title: _____
Are you current: Yes No Number of Months Behind _____
Would you like to keep or surrender this vehicle? _____

15. Boats, motors or Accessories

a. Type: _____ Value \$ _____
b. Type: _____ Value \$ _____

Misc. Secured Creditors:

1. Name: _____ Acct. No. _____ Date Incurred: _____
Address: _____
Property Securing Loan: _____
Balance: \$ _____
2. Name: _____ Acct. No. _____ Date Incurred: _____
Address: _____
Property Securing Loan: _____
Balance: \$ _____
3. Name: _____ Acct. No. _____ Date Incurred: _____
Address: _____
Property Securing Loan: _____
Balance: \$ _____

4. Name: _____ Acct. No. _____ Date Incurred: _____
Address: _____
Property Securing Loan: _____
Balance:\$ _____
5. Name: _____ Acct. No. _____ Date Incurred: _____
Address: _____
Property Securing Loan: _____
Balance:\$ _____

Unsecured Creditors: We will obtain a credit report for you from all three credit reporting agencies. Please list creditors that may not be on your report such as: loans to friends and family, medical bills; pay day or cash advance loans. Please note that we must have a current address for any creditor not on your credit report.

1. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
2. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
3. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
4. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
5. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
6. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____

7. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
8. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
9. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____
10. Name: _____ Acct. No. _____
Balance:\$ _____ Date Incurred: _____
Address: _____