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LEGAL

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BANKRUPTCY INTAKE QUESTIONNAIRE

NAME & RESIDENCE

(Please answer for both Debtor and Spouse)

I. CORRESPONDENCE

1. Full Name(s): include any other names used (if applicable)

(Last, First and Middle)	(Other names used)
Debtor:	AKA:
Spouse:	AKA:

2. Present Address:

Address:		
City:	State:	Zip:

3. List addresses occupied during last 24 months, if different from current and occupancy dates.
Also list the name under which the occupancy occurred:

Address:		
City:	State:	Zip:

4. Social Security Number(s)

Debtor:
Spouse:
Business Tax ID number (EIN), if applicable:

5. Contact Numbers

Debtor:	Spouse:
Telephone #:	Telephone #:
Cell #:	Cell #:
Work #:	Work #:

II. PROPERTY

**Please list the individual items and values.
(Estimated Value is required for All Property)**

Property Type	Estimated Value \$\$\$
Cash on hand	
Checking Accounts (Name Banks)	
Savings Accounts (Name Banks)	
Security Deposit: Public utilities Landlord (name and address) Other	
Household Goods	
Books, Pictures, Art Collections	
Wearing Apparel (combined total)	
Furs and Jewelry	
Fire Arms, Sports Equipment, Photographic Equip and Hobby Equipment	
Interests in Insurance Policy	
Annuities	
Interests in Educational IRAs	
Interests in Pension or Profit Sharing Plans	
Stocks and Interests in a Business (Except for Partnerships)	
Interest in Partnership or Joint Venture	
Government or Corporate Bonds	
Accounts Receivable	
Alimony, Maintenance and Support Receivable	
Other Liquidated Debts Owing Debtor Including Tax Refund for the past year and current year	
Equitable or Future interest of Life Estates	
Decedent's Death Benefits or Trust	
Other Contingent and unliquidated claims including tax refund	
Patents, Copyrights or Intellectual Property	
Licenses, Franchises, and Other Intangibles	

Customer Lists and other Compilations 1) 2) 3) 4)	
Automobiles:(List Year, Make, Model) 1) 2) 3) 4)	
Trucks: :(List Year, Make, Model) 1) 2) 3) 4)	
Trailers: (List Year, Make, Model) 1) 2) 3) 4)	
Automotive Accessories 1) 2) 3) 4)	
Boats: (Year, Make, Model) 1) 2) 3) 4)	
Motorcycle, ATV, Jet Ski, Snowmobiles (Year, Make, Model) 1) 2) 3) 4)	
Aircraft: (Year, Make Model w/registration #)	
Office Machinery, Equipment and Supplies	
Business Inventory	
Animals	
Crops and Growing and Harvested	
Farming Equipment And Implements	
Farming Supplies	

Other Personal Property	
Properties Including Home (List Addresses) (Use County Assessor's Value if you have no appraisals) 1) 2) 3) 4)	

Mortgage:

First Mortgage (All Fields Required)

Creditor Name	
Address	
Date of Claim	
Account Number	
Claim Amount	

Second Mortgage (All Fields Required)

Creditor Name	
Address	
Date of Claim	
Account Number	
Claim Amount	

Do you want to reaffirm the debt on your home?

Automobile, Truck, Recreation Vehicle Loans

Loans (All Fields Required)

Vehicle	
Creditor Name	
Creditor Address	
Date of Claim	
Account Number	
Claim Amount	

Vehicle	
Creditor Name	
Creditor Address	
Date of Claim	
Account Number	
Claim Amount	

Vehicle	
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Creditor Name	
Creditor Address	
Date of Claim	
Account Number	
Claim Amount	

Vehicle	
Creditor Name	
Creditor Address	
Date of Claim	
Account Number	
Claim Amount	

Do you want to reaffirm (keep) any of the above secured property (house, vehicles)?
 Yes_____ No_____ If Yes, please list:

III. INCOME

1. Gross wages, salary, tips, bonuses, overtime, commissions

Debtor:_____ Spouse:_____

2. Net Income from the operation of a business, profession, or farm

Debtor:_____ Spouse:_____

3. Net rental and other real property income

Debtor:_____ Spouse:_____

Gross Receipts:_____ Gross Receipts:_____

Operating Expenses:_____ Operating Expenses:_____

4. Interest, dividends, and royalties

Debtor:_____ Spouse:_____

5. Pension and retirement income (monthly)

Debtor:_____ Spouse:_____

6. Any amounts paid by another person or entity, on a regular basis, for the household expenses of the debtor or the debtor's dependents, including child support paid for that

Debtor: _____ Spouse: _____

7. Unemployment compensation (monthly)

Debtor: _____ Spouse: _____

8. Income from all other sources

Debtor: _____ Spouse: _____

Debtor: _____ Spouse: _____

Debtor: _____ Spouse: _____

9. Previous Years' Income (please provide name and address of employer)

Tax years	Debtor	Spouse
Income for previous year (2019) Employer		
Income for previous year (2020) Employer		

10. Year-To-Date Income Including Employer(s) name and address:

Debtor: _____ Spouse: _____

IV. MONTHLY EXPENSES:

HOUSING:	
Rent	\$
1 st Mortgage	\$
2 nd Mortgage	\$
Homeowners Association Dues \$	\$

**Is property insurance included in your house payment? Are property taxes included in your house payment? Yes _____ No _____

property insurance	\$
property taxes	\$

UTILITIES:	
Gas, Electricity, Heating Fuel	\$
Sewer & Water	\$
Telephone	\$
Cell Phone	\$
Internet	\$
Cable/Satellite/Streaming-Television	\$
Irrigation District	\$
Trash Removal	\$

MISC. EXPENSES:	

Home Maintenance	\$
Food	\$
Personal Expenses	\$
Clothing	\$
Laundry/Dry cleaning	\$

MEDICAL:	\$
Physician	\$
Optician	\$
Dentist	\$
Orthodontist	\$
Chiropractic	\$
Prescriptions	\$
Other	\$

TRANSPORTATION: (Not including Car Payment)	
Gas	\$
Maintenance	\$
Bus/Parking	\$

MISC EXPENSES:	
Charitable Contributions	\$
Tithing	\$
Entertainment	\$
Recreation	\$
Other	\$

INSURANCE:	
Homeowners	\$
Renters	\$
Life	\$
Health/hospital	\$
Auto	\$
Disability	\$
Other (specify)	\$

INSTALLMENTS:	
Auto Payments	\$
Home Owner's Dues	\$
Gym Membership	\$
Other Installments	\$

SUPPORT:	
Alimony	\$
Child Support	\$
Maintenance	\$

OTHER EXPENSES:	
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Regular Expenses from Farming or Profession	
Pet supplies	
Pet Medical Care	
Daycare	
Education	
Other Expenses (List)	

V. EMPLOYMENT (Please answer for both Debtor and Spouse)

1. Occupation:

Debtor: _____ Spouse: _____

2. Present Employer's name and address:

Debtor: _____ Spouse: _____

3. Length of time at this job:

Debtor: _____ Spouse: _____

4. How often do you get paid?

Debtor: _____ Spouse: _____

6. Please list the deductions taken from your pay.

Debtor:	Spouse:
1)	1)
2)	2)
3)	3)
4)	4)

6. PLEASE SUPPLY A COPY OF A RECENT PAY STUB FOR BOTH DEBTOR AND SPOUSE.

7. Do you have money in a pension, retirement fund or plan where you now work or previously worked? If yes, name of fund or plan and approximate value of your interest. Is the pension or retirement fund MANDATORY?

8. PLEASE SUPPLY COPIES OF YOUR FEDERAL AND STATE TAX RETURNS FOR THE PAST THREE (3) YEARS.

VI. DEPENDENTS (If Applicable)

Full Name	Age	Relationship (Son, Daughter, Stepson, etc)

VII. BACKGROUND INFORMATION: (Please answer for both Debtor and Spouse)

1. Have you filed a bankruptcy or a wage earner plan in the last 6 years (Chapter 13)? When and where? If applicable, has the company or entity you own filed a SEPARATE bankruptcy within the last 8 years? When and where?

2. Has anyone attached or garnished your wages in the last year? Whose wages were being garnished, and what company was trying to collect the debt? How much was taken out of your wages?

3. Is anyone threatening to foreclose on any of your property? Who?

4. Have any debts been turned over to a collection agency? Which agency and for which debt?

5. Have any items been repossessed or taken back in the last six months by a company you owe money to?

- a) Who was it? _____
- b) Who repossessed it? _____
- c) When? _____
- d) Were you notified? _____
- e) How? _____

7. Has anyone co-signed or signed for you on a loan that is still owing? Yes _____ No _____

- a) The name and contact details of the person who co-signed and their address: _____
- b) What was the purpose of the loan? _____
- c) Company and contact details of the Company that financed the purchase: _____

8. Have you given anyone any large or expensive gifts this past year? Yes _____ No _____

9. Any gifts for family members in last 12 months if under \$200 or to charities if under \$100 per charity?

Yes _____ No _____

Who and what did you give? _____

10. Do you owe money to anyone who has worked for you (maid, babysitter, or employee)?

- a. Who? _____
- b. What For? _____
- c. Amount? _____
- d. Who employed (husband, wife or both)? _____

11. Do you contribute to an employee benefit plan (per pay period)? Yes _____ No _____ Is any part of it mandatory? Yes _____ No _____

12. Are you entitled to any state or federal income tax refunds? Yes _____ No _____ If yes, how much on each? _____

13. Do you owe any U.S. taxes? Yes _____ No _____ Which agency? _____ Amount? _____

14. Do you owe any State taxes? Yes _____ No _____ Which agency? _____ Amount? _____

15. Do you have any property that belongs to someone else? Yes _____ No _____ If so, List person's name, address and value of property. This includes any property you may have in a storage shed or facility that is property of another person. _____

16. Do you pay anyone child support or alimony, or any other type of domestic support obligation? Yes _____ No _____ If yes, please list the person, their address, the court where the support order was issued and the case number, the amount of support paid monthly, the date the order was entered and the date the child support is no longer required, and the agency where the support is paid through, if any. _____

17. List **all** payments of over \$600.00 per creditor made on loans, installments, purchases of goods and services, and other debts, during the last 90 days. The Trustee will sort out secured and unsecured payments:

Name & Address of Creditor	Payment Date	Amount Paid	Amount Owing

18. Have you made payments to "insiders" in the past 12 months who are or were creditors? Yes _____ No _____ Insiders include family members and corporations or partnerships in which you had at least a 5% ownership or as a person in control? _____

19. Have you made any money on garage sales, eBay, Craig's List, private transfers, etc. in the past six months? Yes _____ No _____ If so, please list the date, name of person, the item was sold to and the amount of money transferred to you from the sale. _____

TO THE BEST OF MY KNOWLEDGE, THE INFORMATION ON THIS QUESTIONNAIRE IS TRUE AND CORRECT. IF MY BANKRUPTCY HAS TO BE AMENDED OR CHANGED IN ANY WAY, I UNDERSTAND THERE WILL BE A MINIMUM ADDITIONAL CHARGE OF \$150.00, PLUS THE COSTS OF PHOTOCOPYING AND POSTAGE EXPENSES.

BRIAN WEBB LEGAL OFTEN TIMES RECEIVES CREDIT OFFERS TO DEBTORS FROM THEIR FORMER CREDITORS, SUCH AS CREDIT CARD COMPANIES. WE STRONGLY ADVISE AGAINST ENTERING INTO THESE AGREEMENTS AND, UNLESS EXPRESSLY INDICATED TO OUR OFFICES, WE WILL NOT FORWARD THESE DOCUMENTS TO YOU.

YOU MUST PROVIDE TO BRIAN WEBB LEGAL, PRIOR TO THE FILING OF THE CASE, THE FOLLOWING DOCUMENTS:

1. Past two years tax returns (2019-2020) – both State and Federal Return;
2. Past six months income records (pay stubs);
3. Past six months bank records for all bank accounts you have; and
4. Copies of all recorded liens against your properties in any county wherever situated.

FAILURE TO COMPLY WITH THIS REQUEST MAY RESULT IN THE CONTINUATION OF YOUR FIRST MEETING OF CREDITORS FOR WHICH YOU WILL BE CHARGED AN ADDITIONAL FEE FROM BRIAN WEBB LEGAL.

PLEASE SAVE ALL RECEIPTS ISSUED BY BRIAN WEBB LEGAL TO ENSURE THAT ALL PAYMENTS BY YOU HAVE BEEN PROPERLY RECORDED.

Date: _____

Debtor's Signature

Date: _____

Spouse's Signature

Please be sure to bring your **original** social security card (no copies) and a photo ID with you to your bankruptcy signing and your first meeting of creditors if held in person.