

How did you find out about this program?

#### PRIOR BANKRUPTCIES

If you previously filed bankruptcy, list the case number \_\_\_\_\_

Did you file Chapter 7 or Chapter 13?

If you need assistance because of something that happened AFTER you filed bankruptcy, explain:

#### CONTACT AND PERSONAL INFORMATION

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Last Name \_\_\_\_\_

County of Residence \_\_\_\_\_

How long have you lived in Pennsylvania? \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Email Address \_\_\_\_\_

#### INFORMATION ABOUT YOUR SPOUSE (IF APPLICABLE)

Date of Marriage \_\_\_\_\_

Spouse's First Name \_\_\_\_\_ Spouse's Middle Name \_\_\_\_\_

Spouse's Last Name \_\_\_\_\_

Has your spouse previously filed bankruptcy? \_\_\_\_\_ If so, year filed \_\_\_\_\_

Case Number of prior bankruptcy? \_\_\_\_\_ Did you file Chapter 7 or 13?

#### CURRENT FINANCIAL STATUS

The following are general questions to determine your current situation. Check the box if the answer to the question is yes:

Are your wages or checking accounts being garnished?

Is a lawsuit pending or completed?

Is your home in a sheriff's or trustee's sale (foreclosure)?

If yes, please indicate the date of trustee's sale \_\_\_\_\_

Is a lender trying to repossess your car?

If you are married, were most of the debts incurred PRIOR to your marriage?

Other Problems? – Explain:

There are certain issues that determine whether or not it is appropriate to file now. Check the box if the answer to the question is yes:

Have you lived in Pennsylvania for more than 3 months?

Do you expect an inheritance in the next 6 months?  
Did you refuse an inheritance in the last 4 years?  
Have you received an inheritance in the last 6 years?  
Have you sold or transferred any property (land, cars, businesses, any items of value) to a friend or relative in the last 4 years?  
Have you sold or transferred any property (land, cars, businesses, any items of value) to anyone who was not a friend or relative in the last 4 years?  
Have you paid any money to a friend or relative in the last 4 years?  
Have you paid more than \$600 to anyone who was not a friend or relative in the last 3 months?  
Is a tax refund expected?  
Do you expect money from anyone in the next 4 years (e.g.: investment coming payable or repayment of a loan)?  
Even if you never expect to collect, does anyone owe you money for any reason whatsoever?  
Explain:

Do you (or your spouse) have a personal injury claim that you can file, is pending or payable?  
Explain:

Do you (or your spouse) have a right to sue anyone for anything? If so, please explain:  
In the last year did you pay taxes with a credit card?  
In the last 3 months have you charged on a credit card or obtain cash advances of more than \$250? NOTE - Do not continue using credit cards if you are filing bankruptcy.  
Are you in the middle of a divorce or separation?  
Have you been divorced in the last 3 years?  
Are you behind on any child support or alimony payments?  
Do you have any student loans?  
If so, are they? Federally backed loans      Privately backed loans  
Do you owe any court fines or penalties, or have any debts that could be considered fraudulent?  
Do you (or your spouse) owe any money to any friend or relative?

#### ASSESTS

List the yard sale value of the following items. If you are married, include items owned by both you and your spouse.

Furniture and appliances \$ \_\_\_\_\_ Collectables \$ \_\_\_\_\_

Guns or burial lots \$ \_\_\_\_\_ Paintings \$ \_\_\_\_\_  
Computers/printers \$ \_\_\_\_\_ Jewelry \$ \_\_\_\_\_  
Pre-paid rent or security deposits \$ \_\_\_\_\_  
Equipment you use in your business \$ \_\_\_\_\_  
Stocks/Bonds/Mutual Funds \$ \_\_\_\_\_  
Annuities/IRA/401 K, etc \$ \_\_\_\_\_  
Life insurance with cash surrender value \$ \_\_\_\_\_  
Interests in any corporations, partnerships, etc \$ \_\_\_\_\_  
Do you own a microwave, computer (not used for business), VCR, DVD?  
If so, what are the item(s) yard sale value \$ \_\_\_\_\_

Did you use your household furnishings or car to get a loan?

Do you own any valuable items that you are concerned about losing? If so describe:

#### HOME AND VEHICLES

Do you own a home? Fair market value \$ \_\_\_\_\_ Total amt owed: \$ \_\_\_\_\_

Are the mortgage payments to your first lender current?

Do you (or your spouse) own other real estate, (e.g. time shares, land, etc)?

If so, list fair market value \$ \_\_\_\_\_ Debt owed \$ \_\_\_\_\_

Do you (or your spouse) own any vehicles?

If so, for vehicle one, list fair market value \$ \_\_\_\_\_ Debt owed \$ \_\_\_\_\_

If so, for vehicle two, list fair market value \$ \_\_\_\_\_ Debt owed \$ \_\_\_\_\_

#### INCOME, TAXES and BUSINESSES

How much money do you earn (bring home) each month? \$ \_\_\_\_\_

How much money does your spouse earn (bring home) each month? \$ \_\_\_\_\_

How much from other sources (alimony, child support, rent)? \$ \_\_\_\_\_

Have all required federal and state income tax returns been filed?

Is IRS or Pennsylvania Department of Revenue collecting back taxes?

If so, how much do you owe to; IRS \$ \_\_\_\_\_ PA Dept of Revenue \$ \_\_\_\_\_

Has IRS or Pennsylvania Department of Revenue garnished your wages or put a lien on your property?

Do you (or your spouse) own any businesses?

If so, what would a third party pay for your interest in the business? \$ \_\_\_\_\_

If so, how much money do you receive each month from this business? \$ \_\_\_\_\_

TOTAL AMOUNT OF MONTHLY INCOME: \$ \_\_\_\_\_

## MONTHLY BUDGET

This form details how much you spend each month for living expenses. Be sure to list the MONTHLY (not yearly) amount of each expense. If these expenses are deducted from your wages (for example: insurance), then do not list it on this form. For utilities, your bill may be higher in the summer than in the winter, so list an amount that is an average covering the last 12-month period. If your spouse does not reside in your home, include his/her expenses separately.

Rent (if you do not own your home) \$ \_\_\_\_\_ or Total mortgage payments \$ \_\_\_\_\_  
Average utilities (electric/water/gas) \$ \_\_\_\_\_ Medical expenses \$ \_\_\_\_\_  
Telephone/Internet \$ \_\_\_\_\_ Home Maintenance (home owners) \$ \_\_\_\_\_  
Food \$ \_\_\_\_\_ Clothing \$ \_\_\_\_\_ Laundry/dry cleaning, etc. \$ \_\_\_\_\_  
Vehicle payment \$ \_\_\_\_\_ Lease? \_\_\_\_\_  
Vehicle payment \$ \_\_\_\_\_ Lease? \_\_\_\_\_  
Gas/maintenance/license \$ \_\_\_\_\_ Recreation, Entertainment \$ \_\_\_\_\_  
Charitable Giving (if claimed on taxes) \$ \_\_\_\_\_ Babysitter/Day Care Expenses \$ \_\_\_\_\_  
Other child care Expenses \$ \_\_\_\_\_ Student Loan Repayment \$ \_\_\_\_\_  
Newspapers, Books, Magazines \$ \_\_\_\_\_  
Are you paying taxes directly (not out of your wages? If so, how much \$ \_\_\_\_\_  
Homeowners insurance \$ \_\_\_\_\_ Renters Insurance \$ \_\_\_\_\_  
Life/Health Insurance \$ \_\_\_\_\_ Automobile Insurance \$ \_\_\_\_\_  
Other Insurance \$ \_\_\_\_\_ Alimony or Child Support \$ \_\_\_\_\_  
Professional Dues \$ \_\_\_\_\_ Union Dues \$ \_\_\_\_\_ Other \$ \_\_\_\_\_

Use the space below to describe any business monthly expenses that you must pay and are not reimbursed by your employer. Explain the type of expense, amount of expense and how long you will continue to have this expense:

TOTAL AMOUNT OF MONTHLY EXPENSES: \$ \_\_\_\_\_

Total number of children \_\_\_\_\_ How many live in your house? \_\_\_\_\_

Special notes you want the attorney to know:

Questions for the attorney?