

J. R. PERKINS, III, P. C.

109 East Fifth Street
The Dalles, OR 97058
Voice (541) 296-1127 • Fax 541-550-2005
jrperkinslawfirm.com
Email jrperkinsiii@charter.net

PRELIMINARY DOCUMENTS - CLIENT INFORMATION WORKSHEETS

	DEBTOR	SPOUSE
Full Name:		
Street Address:		
Mailing Address:		
Home Phone:		
County of Residence:		
Social Security Number:		
Other Tax ID Nos.:		
Email Address:		

What other names have you used in the last six (6) years?

DEBTOR	SPOUSE

PRIOR BANKRUPTCIES: If you have previously filed a bankruptcy petition, please list the case number, date and the location where you filed on the lines following:

PENDING BANKRUPTCIES: If any immediate family member or business partner has a bankruptcy pending, please list the case number, name of debtor, relation to you, date and location where filed, and the bankruptcy judge on the lines following:

WORKSHEET: YOUR PROPERTY

Your Property Provide detailed description What is it? Where is it?	Who Owns It? H -Husband W - Wife J - Joint C -Community	Market value of property	Your ownership share (% , \$)	Value of Liens	Amount of Equity	Exempt? If so, put exemption amount; if not write "NO"
<p>Real property is land and things permanently attached to land. Included are unimproved land, vacation cabins, condominiums, duplexes, rental property, business property, mobile home park spaces, agricultural land, airplane hangars, and any other buildings permanently attached to land. It also includes property you are entitled to by a trust and all property in which you have any legal, equitable, or future interest. If you are in a community property state, your spouse's real estate is also owned by you. (All leases and time shares should be listed on the worksheet for Schedule G.)</p>						
REAL ESTATE (Schedule A) (Attach legal description)						
1. Personal Property (Schedule B) Cash on hand (Indicate source)						
2. Deposits of money (Bank accounts, credit union accounts, prepaid credit cards, prepaid internet accounts - Indicate source)						
3. Security deposits						

4. Household goods, supplies and furnishings						
5. Books, pictures, art objects; stamp, coin and other collections						
6. Wearing apparel						
7. Jewelry						
8. Firearms, sports equipment and other hobby equipment						
9. Interests in life insurance policies that have value						
10. Annuities						
11. Pension or profit-sharing plans						
12. Stocks and interests in incorporated and unincorporated companies						

13. Interests in partnerships						
14. Government and corporate bonds and other negotiable and non-negotiable instruments						
15. Accounts receivable						
16. Family support (to which you are or may be entitled)						
17. Other liquidated debts owing debtor, including tax refunds						
18. Equitable and future interests, life estates and rights or powers						
19. Interest in an estate of a decedent						
20. Other contingent and unliquidated claims						
21. Patents, copyrights and other intellectual property						
22. Licenses, franchises and other general intangibles						

23. Automobiles, trucks, trailers and other vehicles						
24. Boats, motors, and accessories						
25. Aircraft and accessories						
26. Office equipment, furnishings and supplies						
27. Machinery, fixtures, equipment and supplies						
28. Inventory						
29. Livestock, poultry and other animals						
30. Crops						

31. Farming equipment and implements						
32. Farm supplies, chemicals and feed						
33. Other personal property						

WORKSHEET: YOUR DEBTS - Secured and Priority

Creditors' Name and Address	Acct. No. And Date Incurred	Who is Liable For Debt? H - Husband W - Wife J - Joint	Market Value of Property	Balance Owed	Is Anyone Else Liable? List Name and Address
Secured debts are car loans, home loans, home equity loans, second mortgages, or any other loans where property is pledged as security. All other types of debt are unsecured.					
Mortgage(s) on Principal Res.					
Automobile Loans					

List other Secured Debts Below:					
List priority claims below:					
Federal Taxes	Describe tax due				
State Taxes	Describe tax due				

WORKSHEET: YOUR DEBTS - Unsecured

Creditors' Names and Address	Account No. And Date Incurred (last time charged on credit cards)	Describe Debt	Who is Liable For Debt? H - Husband W - Wife J - Joint	Balance Owed	Is Anyone Else Liable? List Name and Address
List all Unsecured Debts Below					

CLIENT WORKSHEET

LEASES OR CONTRACTS: Are you a party to any leases or contracts? If yes, list the parties involved and their addresses. If you owe money on these contracts, they should be listed on the Schedules above.

DEBTOR

SPOUSE

Marital Status:		
Age:		
Occupation:		
Length of Employment:		
Employer Name:		
Employer Address:		

DEPENDENTS

Name:		
Age:		
Relationship:		
Name:		
Age:		
Relationship:		

WORKSHEET: YOUR INCOME

	DEBTOR	SPOUSE
Current monthly gross wages, salary, commissions (pro-rate if not paid monthly)		
Estimated monthly overtime		
Subtract payroll taxes and Social Security		
Subtract insurance deducted from wages		
Subtract union dues deducted from wages		
Other payroll deductions - please specify		
Regular monthly income from business, profession, or farm (Attach a detailed statement)		
Monthly income from real property		
Monthly interest and dividends		
Alimony, maintenance or support payments (amount received monthly for debtor's or debtor's dependents' use)		
Social Security or government assistance		
Pension or retirement		
Other monthly income		
Describe any increase or decrease of more than 10% in any previous category anticipated to occur in the year following this filing		
NET INCOME PER MONTH		

WORKSHEET: YOUR EXPENSES

	DEBTOR	SPOUSE
Rent or home mortgage payment Does this include real estate taxes? Does this include property insurance?		
Electricity and heating fuel (average monthly)		
Water and sewer (average monthly)		
Telephone (average monthly)		
Other utilities- specify (average monthly)		
Home maintenance (repairs and upkeep)		
Food		
Clothing		
Laundry and dry cleaning		
Medical and dental expenses		
Transportation (not including car payments)		
Recreation, clubs and entertainment, newspapers, etc.		
Charitable contributions		
Homeowners' or renters' insurance		
Life insurance (not deducted from wages)		
Health insurance (not deducted from wages)		
Auto insurance		
Other insurance - specify		

Taxes not deducted from wages or in home mortgage payments		
Installment auto payments		
Other installment payments not included in Chapter 13 Plan		
Alimony, maintenance, and support paid to others		
Payments for dependents not living in your home		
Operation expenses of business, profession, or farm		
Other expenses - specify		
TOTAL EXPENSES		

STATEMENT OF FINANCIAL AFFAIRS

1. List every address where you have lived other than where you live now during the last **3 years**.
 NONE

Address	Name Used	Dates of Occupancy

2. If you lived with a spouse or domestic partner in a community property state or territory (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington, and Wisconsin) within the last **8 years**, list the state or territory where you lived and the name and current address of your spouse or domestic partner.
 NONE

Community Property State or Territory	Name and Address of Spouse or Domestic Partner

3. List the total amount of income that you received from all jobs and all businesses, including part-time activities, during this year and the two previous calendar years..
 NONE

Source (name and address)	Amount	Fiscal Period

4. List any other income that you received during this year and the two previous calendar years.
 NONE

Creditors (name and address)	Dates of Payments	Amount Paid	Amount Still Owing

5. **If your debts are primarily consumer debts (i.e. non-business)**, list each creditor to whom you paid a total of **\$600** or more within the last **90 days**. Do not include payments for domestic support obligations, such as child support and alimony.
 NONE

Creditors (name and address)	Dates of payments	Amount paid	Amount still owing

6. **If your debts are primarily non-consumer debts (i.e. business)**, list each creditor to whom you paid a total of **\$6,425** or more in one or more payments within the last **90 days**. Do not include payments for domestic support obligations, such as child support and alimony.
 NONE

Creditors (name and address)	Dates of payments	Amount paid	Amount still owing

7. List all payments that you made within the past **1 year** to any "insider." (*"Insiders" include your relatives, your business partners and their relatives, your corporations, or your affiliates.*)
 NONE

Name and Address of Insider	Dates of Payment	Total Amount Paid	Amount Still Owed	Reason for payment

8. List all payments or transfers of property that you made within the past **1 year** that benefitted an "insider."
 NONE

Name and Address of Insider	Dates of Payment	Total Amount Paid	Amount Still Owed	Reason for payment

9. List any lawsuits, court actions, or administrative proceedings to which you are or were a party within the past **1 year**.
 NONE

Case Title and Case Number	Nature of the Case	Court or Agency and Location	Status or Disposition

10. Describe all property that has been repossessed, foreclosed, garnished, attached, seized, or levied within the past **1 year**.
 NONE

Creditor's Name and Address	Description and Value of Property	Date	Explain what happened

11. List all setoffs made by any creditor, including a bank or financial institution, against a debt or deposit within **90 days** before the filing of this case. Include any refusals by a creditor to make a payment because you owed a debt.
 NONE

Creditor's Name and Address	Description of Action Taken by Creditor	Date Action Taken	Setoff Amount and Last 4 Digits of Account Number

12. Within the past **1 year**, was any of your property in the possession of an assignee for the benefit of creditors, a

court-appointed receiver, a custodian, or another official?

- NO
- YES

13. List any gifts that you made within the past **2 years** that have a total value of more than \$600 per person.
NONE

Name and Address of Recipient	Relationship to You	Description of Gifts	Dates Gifts Given	Value

14. List any gifts or contributions that you made to a charity within the past **2 years** that have a total value of more than \$600.
NONE

Name and Address of Charity	Description of Contribution	Contribution Date	Value

15. List all losses from fire, theft, or other disaster, or gambling within the past **1 year or since the filing of this case**.
NONE

Description of Property and How Loss Occurred	Description of any Insurance Coverage <i>(include the amount that insurance has paid)</i>	Date of Loss	Value of Property Lost

16. List all payments made or property transferred by you or by someone acting on your behalf to anyone you consulted about filing for bankruptcy or preparing a bankruptcy petition within the past **1 year**. Include any attorneys, bankruptcy petition preparers, or credit counseling agencies.
NONE

Name and Address of Person Paid	Name of Person Who Made the Payment, if Not You	Description and Value of Any Property Transferred	Date of Payment or Transfer	Amount of Payment

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17. List all payments made or property transferred by you or by someone acting on your behalf within the past **1 year** to anyone who promised to help you deal with your creditors or to make payments to your creditors.
 NONE

Name and Address of Person Paid	Name of Person Who Made the Payment, if Not You	Description and Value of Any Property Transferred	Date of Payment or Transfer	Amount of Payment

18. List all property, other than property transferred in the ordinary course of your business or financial affairs, that you sold, traded, or transferred either absolutely or as a security within the past **2 years**.
 NONE

Name and Address of Person Who Received the Transfer/ Relationship to You	Description and Value of Property Transferred	Describe Any Property or Payments Received or Debts Paid in Exchange	Date of Transfer

19. List all property you transferred within the past **10 years** to a self-settled trust or a similar device of which you are a beneficiary.
 NONE

Name of Trust	Description and Value of Property Transferred	Date of Transfer

20. List all financial accounts and instruments held in your name or for your benefit that were closed, sold, moved, or transferred within the past **1 year**.

NONE

Name and Address of Institution	Last 4 Digits of Account Number	Type of Account or Instrument	Date Account Was Closed, Sold, Moved, or Transferred	Last Balance Before Closing or Transfer

21. List each safe deposit box or other depository for securities, cash, or other valuables that you have had within the past **1 year**.

NONE

Name and Address of Financial Institution	Name and Address of Anyone With Access to Box or Depository	Description of Contents	Do You Still Have It?

22. List any storage unit or place other than your home in which you have stored property within the past **1 year**.

NONE

Name and Address of Financial Institution	Name and Address of Anyone With Access to Box or Depository	Description of Contents	Do You Still Have It?

23. List all property that you hold or control that is owned by someone else.

NONE

Name and Address of Owner	Location of Property	Description of Property	Value

24. List every site for which you received notice by a governmental unit that you may be liable under or in violation of an environmental law. Include the name and address of the governmental unit, the date of the notice, and, if known, the environmental law. *Environmental law* means any federal, state, or local statute or regulation regulating pollution,

contamination, releases of hazardous or toxic substances, wastes or material into the air, land, soil surface water, ground water, or other medium, including, statutes or regulations controlling the cleanup of these substances, wastes, or material. *Site* means any location, facility, or property as defined under any environmental law, whether you own, operate, or utilize it or used to own, operate, or utilize it, including disposal sites. *Hazardous material* means anything an environmental law defines as a hazardous waste, hazardous substance, toxic substance, hazardous material, pollutant, or contaminant or similar term.

NONE

Site Name and Address	Name and Address of Government Unit	Environmental Law, If You Know It	Date of Notice

25. List the name and address of every site for which you have notified a governmental unit of a hazardous material release. Include the name and address of the governmental unit to which the notice was sent, the date of the notice, and, if know, the environment law.

NONE

Site Name and Address	Name and Address of Government Unit	Date of Notice	Environmental Law

26. List all judicial or administrative proceedings, including settlements and orders, under any environmental law to which you have been a party. Include the case title and the case number, the court or agency, the nature of the case, and the status.

NONE

Case Title and Case Number	Name and Address of Court or Agency	Nature of the Case	Status of the Case

27. List the name and address, nature of business, name of accountant or bookkeeper, Employer Identification Number (EIN), and dates of operation of every business you owned or with which you had any of the following connections within the past **4 years**.

- A sole proprietor or self-employed in a trade, profession, or other activity, either full-time or part-time
- A member of a limited liability company (LLC) or limited liability partnership (LLP)
- A partner in a partnership
- An officer, director, or managing executive of a corporation
- An owner of at least 5% of the voting or equity securities of a corporation

NONE

Business Name and Address	Nature of Business	Name of Accountant or Bookkeeper	Employer Identification Number (EIN)	Beginning and End Dates of Operation

28. List all financial institutions, creditors, or other parties to which you gave a financial statement about your business within the past **2 years**.
 NONE

Name and Address	Date Issued

ATTACHMENT TO SCHEDULE B, NO. 4
 HOUSEHOLD GOODS AND FURNISHINGS

DESCRIPTION OF ITEM(S)

Living Room	Value of item(s)
Davenport	
Love seat	
Overstuffed chair(s)	
Recliner(s)	
Other chairs	
Coffee table(s)	
End table(s)	
Lamp(s)	
Bookcase	
Television	
Stereo	
Entertainment center	
SUBTOTAL	

Dining Room	Value
Table	
Chairs	
Credenza	
Sideboard	
China cabinet	
Buffet	
Other - specify	
SUBTOTAL	

Kitchen	Value
Stove	
Refrigerator	
Microwave	
Freezer	
Table & chairs	
Dishwasher	
Eating & cooking utensils	
Other - specify	
SUBTOTAL	

Bedroom(s)	Value
Bed(s)	
Chest of drawers	
Dresser(s)	
Footlocker	
Chest(s)	
Vanity	

Lamp(s)	
Other - specify	
SUBTOTAL	

Utility/Basement/Shop	Value
Washer/dryer	
Other - specify	
SUBTOTAL	
Sporting goods/hobby equipment	Value
Fishing	
Bicycles	
Firearms - specify make, model, whether it is a handgun, shotgun, rifle, etc.	
Ski equipment	
Windsurfing gear	
Other - specify	
SUBTOTAL	
GRAND TOTAL of household goods and furnishings	\$

VEHICLE INFORMATION

CARS

	Vehicle #1	Vehicle #2
Year		
Make		
Model		
Color		
Mileage		
4, 6 or 8 Cyl - specify		
SPECIAL EQUIPMENT		
Auto or Manual Transmission		
AWD or 4WD		

TRUCKS/VANS

	Vehicle #1	Vehicle #2
Year		
Make		
Model		
Color		
Mileage		
4, 6 or 8 Cyl - specify		
SPECIAL EQUIPMENT		
Auto or Manual Transmission		
2WD or 4WD		

BANKRUPTCY DOCUMENT CHECKLIST
District of Oregon/Eastern District of Washington

Tax returns for the last 3 years

Pay stubs and/or verification of all sources of income received over the last 6 months;

Real estate market analysis for any real property;

Record of any property/asset sales or transfers for the past two years;

Record of any secured transactions (i.e. home loans, auto loans or any other loans with collateral) for the past 910 days;

Records of IRAs, 401ks or other retirement accounts;

Records of any educational IRAs;

Copies of all bank statements for the past 90 days (6 months if income is directly deposited into the bank account);

Copies of all insurance policies;

Copies of any pending legal proceedings to which you are a party;

Records of any state tuition programs;

Records of any medical savings plans;

All bills and/or statements received in the past 90 days;

Credit report;

Divorce decree;

Orders creating domestic (child or spousal) support obligations;

List of assets at resale value;

Pre-bankruptcy Credit Counseling Certificate.