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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"
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.)						
REAL ESTATE (Schedule A) (Attach legal description)						
1. Personal Property (Schedule B) Cash on hand (Indicate source)						
2. Deposits of money (Indicate source)						
3. Security deposits						
4. Household goods, supplies and furnishings						
5. Books, pictures, art objects; stamp, coin and other collections						
6. Wearing apparel						

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"
7. Jewelry						
8. Firearms, sports equipment and other hobby equipment						
9. Interests in insurance policies						
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)						

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"
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						

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"
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					

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

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		
Health insurance		
Auto insurance		
Other insurance - specify		
Taxes not deducted from wages or in home mortgage payments		

	DEBTOR	SPOUSE
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. Income from employment or operation of business. Enter each income source for the past two years. Specify the amount of income and the fiscal year. Also enter income earned for current year.

Source (name and address)	Amount	Fiscal Period

2. Income other than from employment or operation of business. Enter sources of any other income during the past two years. Specify the amount of income and the fiscal year.

Source (name and address)	Amount	Fiscal Period

3. List payment to creditors during the last 90 days which total \$600.00 or more during the 90 day period.

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

4. Were you a party to any lawsuits during the last year? Yes No
 If yes, list the following on the back of this sheet: caption of suit, case number, nature of proceeding, court and location, status/disposition.

Caption of Suit and Case #	Nature of Proceeding	Court & Location	Status or Disposition

4b. List any property attached, garnished or seized during the last year.

Creditor (name and address)	Date of seizure	Description and value of property

5. List any repossessions, foreclosures and returns during the last year.

Creditor (name and address)	Date of repossession	Description and value of property

6a. Describe any assignment of property for the benefit of creditors made within the last 120 days. On the back of this sheet list the name and address of assignee, date of assignment and terms of assignment or settlement.

6b. List all property which has been in the hands of a custodian, receiver, or court-appointed official during the past year. On the back of this sheet list the name and address of custodian, name and location of court, case title and number, date of order, description and value of property.

7. List all gifts or charitable contributions made during the last year except ordinary and usual gifts to family members totaling less than \$200 per family member and \$100 per charitable recipient.

Recipient (name and address)	Relationship (if any)	Date of gift	Description and value of gift

8. List all losses from fire, theft, other casualty or gambling during the past year. On the back of this sheet list the description and value of property, circumstances of loss, if loss was covered by insurance (give particulars) and date of loss.

Description & Value of Property	Description of circumstances and, of loss, was loss covered in whole or in part by insurance, give particulars	Date of Loss

9. List all payments made or property transferred by or on behalf of the debtor to any persons, including attorneys, for consultation concerning debt consolidation, relief under the bankruptcy law or preparation of a petition in bankruptcy during the past year.

Payee (name and address)	Date of Payment, Payor	Amount Paid or Value of property transferred

10. List all other property, other than property transferred in the ordinary course of the business or financial affairs of the debtor, transferred either absolutely or as security during the past year.

Transferee & relationship (name and address)	Date	Describe property transferred and value received

11. List all financial accounts and instruments held by or for the benefit of the debtor which were closed, sold or otherwise transferred in the past year. Include checking, savings, or other financial accounts, CD's, shares and share accounts held in banks, credit unions, pension funds, brokerage houses, etc.

Institution (name and address)	Acct. Type & number Amt of final balance	Amount and date of sale or closing

12. List each safe deposit or other box or depository in which you have had valuables within the past year.

Institution (name and address)	Who has access? (Names and address)	Description of contents	Date of transfer or surrender

13. List all setoffs made by any creditor, including a bank, against a debt or deposit of the debtor within the past 90 days.

Creditor (name and address)	Date of Setoff	Amount of Setoff

14. List all property OWNED by another person that the debtor holds or controls.

Owner (name and address)	Description & value of property	Amount and date of sale or closing

15. If you have moved within the last TWO years, list all premises occupied and vacated during that period.

Address	Name used	Dates of occupancy

16. If you resided in a community property state, commonwealth, or territory (including Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington or Wisconsin) within the **six year period** immediately preceding the commencement of the case, identify the name of your spouse and of any former spouse who resided with you in the community property state.

Dates	Name of spouse

17. Environmental Information

For purposes of this question, the following definitions apply:

“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, groundwater, or other medium, including, but not limited to, statutes or regulations regulating the cleanup or these substances, wastes, or material.

“Site” means any location, facility, or property as defined under any Environmental Law, whether or not presently or formerly owned or operated by the debtor, including, but not limited to, disposal sites.

“Hazardous Material” means anything defined as a hazardous waste, hazardous substance, toxic substance, hazardous material, pollutant, or contaminant or similar term under an Environmental Law.

- a. List the name and address of every site for which the debtor has received notice in writing by a governmental unit that it may be liable to potentially liable under or in violation of an Environmental Law. Indicate the governmental unit, the date of the notice, and, if known, the Environmental Law:

Site name and address	Name and address of Governmental unit	Date of Notice	Environmental Law

- b. List the name and address of every site for which the debtor provided notice to a governmental unit of a release of Hazardous Material. Indicate the governmental unit to which the notice was sent and the date of the notice.

Site name and address	Name and address of Governmental unit	Date of Notice	Environmental Law

- c. List all judicial or administrative proceedings, including settlements or orders, under any Environmental Law with respect to which the debtor is or was a party. Indicate the name and address of the governmental unit that is or was a party to the proceeding, and the docket number.

Name and address of Governmental Unit	Docket Number	Status or Disposition

NOTE: There are additional questions for corporate debtors and for any individual debtor who has been, within the past two years, any of the following: an officer, director, managing executive, or owner of more than 5 percent of the voting securities of a corporation; a partner, other than a limited partner, of a partnership; a sole proprietor or otherwise self-employed.

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
Make		
Model		
Year		
Mileage		
V-4/6/8 - specify		
SPECIAL EQUIPMENT		
Auto Transmission		
3/4/5 Speed - specify		
Power Steering		
Cruise Control/tilt steering wheel		
Air conditioning		
AM/FM Stereo radio/cassette		
Power seats/door locks		
Leather seats		
Sun roof (flip-top/sliding)		
Moon roof		
T-bar roof		
Wire wheel covers		
Custom/wire wheels		
Third seat (station wagon)		

TRUCKS/VANS

	Vehicle #1	Vehicle #2
Make		
Model		
Year		
Mileage		
V-4/6/8 - specify		
SPECIAL EQUIPMENT		
Auto Transmission		
3/4/5 Speed transmission - specify		
Power Steering		
Cruise Control/tilt steering wheel		
Air conditioning		
AM/FM Stereo radio/cassette		
Power seats/door locks		
Leather seats		
Hiback bucket seats		
Captain's chairs		
Wire wheel covers		
Custom/wire wheels		
Seating packages (vans)		
Roof rack		
Fiberglass p/u shell		
Roll bar		
Grille guard		
Winch		
Custom bumper		
Tu-tone paint		
Step-side - ½ T P/U <input type="checkbox"/> ¾ T P/U <input type="checkbox"/>		

	Vehicle #1	Vehicle #2
Custom wheels		
Mag wheels w/wo wide tires		
Auxiliary fuel tank(s)		
Camper/towing package		
Dual rear wheels		
Single rear wheels		
Hydraulic liftgate		
Underbody hoist		
2-speed rear axle		
Stake godies (p/u in feet)		
Van bodies (in feet)		
Utility body		

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.