

QUESTIONNAIRE

Gresham Family & Bankruptcy Law
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SECTION A

Name (include middle) _____

Street Address, City, and Zip Code _____

Mailing Address (if different) _____

Home Telephone _____ Work Telephone _____

Cell _____ Email Address _____

Other names you have used in last 10 years _____

Spouse's name _____

Street Address, City, and Zip Code _____

Mailing Address (if different) _____

Home Telephone _____ Work Telephone _____

Cell _____ Email Address _____

Other names you have used in last 10 years _____

List the names and ages of all your dependents and their relation to you.

Name _____ Age _____ Relation to You _____

Name _____ Age _____ Relation to You _____

Name _____ Age _____ Relation to You _____

Name _____ Age _____ Relation to You _____

How many people live in your household? _____ How much do they contribute to household expenses? _____

Have you ever filed any other bankruptcies? Yes _____ No _____ If so, where? _____

What was the date it was filed? _____ Case Number? _____.

When do you want to file your case? _____

Which chapter did we discuss filing for you? Chapter 7 _____ or Chapter 13 _____

SECTION B

Your Real Property (house or land)

Do you or your spouse own a house or other real property: Yes _____ No _____. If no, skip to next section.

Address _____

Is this your residence? Yes _____ No _____

Value (what can you sell it for) _____ Why do you think it is worth this amount? (Appraisal, opinion of real estate broker, your own estimate, etc.) _____

How much do you owe on it? _____

Are you behind on your mortgag (If yes, how much?): _____

**PLEASE LIST ALL PROPERTY YOU OWN OF ANY KIND
YOU MUST LIST A DOLLAR VALUE FOR ALL PROPERTY**

Additional space available on back of this page.

Type of Property	Value (\$\$)	Description and Location
1. Cash on hand:		
2. Checking, savings or other financial accounts (include name of your bank) certificates of deposit or shares in banks, savings and loans, thrifts, building & loan, and homestead associations, or credit unions, brokerage houses or cooperatives		
3. Security deposits with public utilities, telephone companies, landlords & others.		
4. Household goods & furniture		
5. Audio, video, & computer equipment including gaming systems, tablets, and cell phones		
6. Books, pictures and other art objects, antiques, stamp, coin, record, tape, compact disc and other collections or collectibles.		
7. Clothing		
8. Furs & Jewelry (list the type of jewelry and include costume jewelry)		
9. Firearms, sports, photography and other hobby equipment. (Be specific and list separately)		
10. Insurance policies. List company and cash value.		
11. Annuities.		

12. Retirement Plans (Specify if it is a IRA, 401K, etc.) include retirement through employment		
13. Stocks and interest in incorporated or unincorporated businesses.		
14. Interests in partnerships and joint ventures.		
15. Government and corporate bonds and other negotiable and non-negotiable instruments.		
16. Accounts receivables (unpaid wages, money owed to you, etc).		
17. Alimony, support or property settlements which you are or may be entitled to.		
18. Any other debts owed to you including TAX REFUNDS.		
19. Equitable or future interests, life estates in property and other rights or powers that may be exercised by you.		
20. Interest in an estate of someone who has died (inheritance), death benefit plan, life insurance or trust.		
21. Any debt that may be owed to you even if you are not sure how much it may be (Example: someone injured you in a car wreck and you have not filed suit yet).		
22. Patents, copyrights or other intellectual property.		
23. Licenses, franchises, other intangible property.		

24. Automobiles, trucks, trailers and other vehicles (Please indicate the model type such as LX, DX, LE, etc.)	Make _____ Model _____ Year _____ Miles _____
	Make _____ Model _____ Year _____ Miles _____
	Make _____ Model _____ Year _____ Miles _____
25. Boats, motors and accessories.	
26. Aircraft and accessories.	
27. Machinery, fixtures, equipment and supplies used in business and tools used in your trade or occupation.	
28. Animals including house pets.	
29. Crops or farm animals whether growing or harvested.	
30. Farming equipment and implements.	
31. Farm supplies, chemicals and feed.	
32. Any other personal property of any kind that you have not listed above.	

Do you have any leases, rent to own agreements or other contracts?
If yes, list name and address of other party and type of lease or contract.
Name _____
Address _____
Type of Contract _____

SECTION D

Tax Debts

Federal Taxes	Amount owed	When Return Filed/Comments
Year _____	: _____	: _____
Year _____	: _____	: _____
Year _____	: _____	: _____
Year _____	: _____	: _____
State Taxes	Amount owed	When Return Filed/Comments
Year _____	: _____	: _____
Year _____	: _____	: _____
Year _____	: _____	: _____
Year _____	: _____	: _____
Other Tax Debts	Amount owed	When due/ Comments
Type/ Year	:	:
Type/ Year	:	:

SECTION E

Miscellaneous Information

None 1. List all other address you have lived at for the last 3 years. Include the dates (Month and Year) at each address and the name you used there.

Full Address _____
Dates resided there: From _____ **To** _____

Full Address _____
Dates resided there: From _____ **To** _____

Full Address _____
Dates resided there: From _____ **To** _____

Full Address _____
Dates resided there: From _____ **To** _____

None 2. List income from all other sources other than employment or business for the past 2 years. (Unemployment, Child support, 401K distribution, Social Security, etc.)

You:

This Year **Source of Income** _____ **Amount \$** _____
Last Year **Source of Income** _____ **Amount \$** _____
Prior Year **Source of Income** _____ **Amount \$** _____

Spouse:

This Year **Source of Income** _____ **Amount \$** _____
Last Year **Source of Income** _____ **Amount \$** _____
Prior Year **Source of Income** _____ **Amount \$** _____

None 3.. List any creditors you have paid a total of \$600 or more to in the last 3 months. (For example, a house payment or car payment of \$200 per month or more.)

Creditor _____ **Dates paid** _____ **Amount \$** _____

Creditor _____ **Dates paid** _____ **Amount \$** _____

Creditor _____ **Dates paid** _____ **Amount \$** _____

Creditor _____ **Dates paid** _____ **Amount \$** _____

None 4. List any payment you made to or for family members, business partners, friends, etc. within the last year (includes rent, food, debts, etc.).

Name/Address: _____
Dates Paid: _____ **Amount \$** _____

Name/Address: _____
Dates Paid: _____ **Amount \$** _____

Name/Address: _____
Dates Paid: _____ **Amount \$** _____

None 5. List any lawsuits you have been involved with within the last year.

Court location _____ Case Number _____
Names of Parties _____

Court location _____ Case Number _____
Names of Parties _____

None 6. Describe any money that has been garnished, set-off, or seized within the last year.

Creditor Name _____ Date seized or garnished _____
Amount \$ _____

Creditor Name _____ Date seized or garnished _____
Amount \$ _____

None 7. List all property that has been repossessed, foreclosed or sold in the last year.

Creditor Name _____ Date of Repo/Foreclosure _____
Value of Property \$ _____

Creditor Name _____ Date of Repo/Foreclosure _____
Value of Property \$ _____

Creditor Name _____ Date of Repo/Foreclosure _____
Value of Property \$ _____

Creditor Name _____ Date of Repo/Foreclosure _____
Value of Property \$ _____

None 8. List all gifts or charitable contributions, including tithing to a church,
made within the last year.

Name/ Address _____ Type of Gift _____
Value \$ _____ Date(s) Given: _____

Name/ Address _____ Type of Gift _____
Value \$ _____ Date(s) Given: _____

None 9. List all losses from fire, theft, other casualty or gambling with the last year.
Please list the value of the item(s) and when and where the loss occurred.

Name/ Address _____ Type of Loss _____
Value \$ _____ Date(s) Given: _____

Name/ Address _____ Type of Loss _____
Value \$ _____ Date(s) Given: _____

None 10. List any payments or transfers of property made to anyone for consultation concerning debt consolidation or Bankruptcy (i.e. Consumer Credit, attorneys, paralegals) other than Gresham Family and Bankruptcy Law.

Name: _____ Dates _____ Amounts \$ _____

None 11. List any property of any kind you have transferred for any reason other than in the normal course of your affairs within the last year. (For example, selling or trading a car.)

Type of Property _____ Date Transferred/Sold _____
Value Received \$ _____ Name of buyer/transferee _____
Address of buyer/Transferee _____

Type of Property _____ Date Transferred/Sold _____
Value Received \$ _____ Name of buyer/transferee _____
Address of buyer/Transferee _____

None 12. Have you ever received an inheritance or do you think you may receive an inheritance within the next year? _____

None 13. List all financial accounts (checking, savings, brokerage accounts, etc.) closed within the last year. Please list the address of your branch.

Name of Bank/Institution _____
Address _____
Date Account Closed _____ Final balance when closed \$ _____

None 14. List any safe deposit boxes or storage units you have.

Name of Bank/Institution _____
Address _____
Describe Contents _____
Names of other people with access _____

Name of Company/ Service _____
Address _____
Describe Contents _____
Names of other people with access _____

None 15. List any property you are borrowing, keeping or holding for another person. Include the name and address of the owner and the description and value of the property. (For example, are you borrowing a car?)

Name of Owner _____
Address _____
Description of Property _____ Value \$ _____

None 16. List any businesses you have owned or operated in the past 2 years.

Include dates of operation.

Name of Business _____
Address _____
Dates of Operation: From _____ To _____
Type of Business _____

Name of Business _____
Address _____
Dates of Operation: From _____ To _____
Type of Business _____

None 17. Have you ever owned a house or land other than the property you listed on page one? If so, what happened to the property?

None 18. Please use the space below to outline or items that we will need to know before filing your case:

When you have this questionnaire completed, please return it during your next appointment.

Thank you!