Bankruptcy Questionnaire

Attached is the information we need to complete your bankruptcy petition. Please completely and accurately fill out the attached worksheet. Do not leave any blank spaces. If a question does not pertain to your situation, put “none.”

The information you give us will be used to complete your official bankruptcy petition for filing in federal Bankruptcy Court. The information must be accurate. Making a false statement on a bankruptcy petition, or omitting or concealing assets can subject you to fine, imprisonment, or both.

We can only help you with a Chapter 7 filing (also known as “straight” or liquidation bankruptcy) or a Chapter 13 (a pay back plan).

Please provide me with copies of the following documents. The most important documents to get started are the tax returns and pay stubs. Not every document is needed in every case; so if you do not have something, please do not worry. We may be able to proceed without it.

1) Last seven months of proof of income for each wage earner; this includes paystubs, social security, child support, spousal support, gifts, or lump sum receipts.
2) Last two years of state and federal tax returns for chapter 7 cases, including W-2s.
3) Last four years of tax returns for chapter 13 cases, including W-2s. If you do not have them all, call me for alternatives.
4) Last six months of bank and/or credit union statements.
5) A recent bill or collection notice for each creditor if you have it.
6) A copy of your credit report. (can get for free at AnnualCreditReport.com)
7) Most recent property tax statement if you own a house or land.
8) Vehicle registration or title for all vehicles.
9) 401K, pension plan or IRA statement showing balance in each account.
10) If self-employed, monthly break-down of all business income and expenses for prior seven months

I certify that to the best of my knowledge I have provided complete and truthful answers in this questionnaire package and understand that my lawyers cannot help me without such information. I do not hold my lawyers responsible for knowing anything that I did not include in this questionnaire.

CLIENT:_____________________________ (Please print name)

Signature:_____________________________

Date:_____________________________

CLIENT:_____________________________ (Please print name)

Signature:_____________________________

Date:_____________________________

BANKRUPTCY QUESTIONNAIRE

1. Full name: FIRST MIDDLE LAST

A. Debtor (Husband, if married):____

SSN#____________________Date of Birth:______________ Driver's License No:______________

Joint Debtor (Wife, if married): ____

SSN#____________________Date of Birth:______________ Driver's License No:______________

Email addresses:____

B. Other names used within past six years? Yes / No (do not list maiden name if no debts are in that name) If yes, list:______________________________________

C. Business Name(s):____

D. Home Street address: ____

E. Mailing address:____

How long have you been living in this state?__________You must be in the state for at least 90 days prior to filing bankruptcy.

Debtor work #____________________ Joint Debtor work #____________________________

Home #__________________________Cell phone, message or emergency #_______________

County of residence:______________________

F. Name, address, and phone number of someone who will know where you are if we need to contact you within five years:____________________________________
____

G. Marital Status: Single, Married, Separated, Divorced:____________________________

Children or Dependents that reside with you (Names and Ages):

Name:____ Age:____________________

Name:____ Age:____________________

Name:____ Age:____________________

Name:____ Age:____________________

Name:____ Age:____________________

Name:____ Age:____________________

2. Prior bankruptcy filed? Yes / No If yes, where?____

Year filed and month:_________________________ Discharge obtained? ____________________

Case number, if known:_________________________ Chapter filed: ________________________

3. Date Questionnaire Completed: ____

4. Occupation

A. Debtor's occupation is: (example - Teacher)____________________________________

Where employed now?____________________ How long employed? ____________________

Address of Employer: ____

Pay period (**IMPORTANT**): monthly/twice a month/every other week/weekly ______________

Exact day(s) of the month you are paid ____

Exact take-home pay per pay period or accurate average: $____________________________

Salary/hourly wage $____

Name and phone number of payroll clerk:____

Is this income steady? Yes / No. If no, explain why not, including when it is higher or lower and by approximately how much. ________________________________

B. Joint Debtor's occupation is (example - Teacher)__________________________________

If not employed, do you anticipate employment, and when?____________________________

Where employed now:__________________________ How long employed?_______________

Address of Employer: ____

Pay period (**IMPORTANT**): monthly/twice a month/every other week/weekly_______________

Exact day(s) of the month you are paid: ____

Exact take-home pay per pay period or accurate average: $____________________________

Salary/hourly wage: $____

Name and phone number of payroll clerk:____

Is this income steady? Yes / No. If no, explain why not, including when it is higher or lower and by approximately how much.____

C. Are debts primarily business or consumer debts?__________________________________

5. Real Property or Mobile Home: Does your name show up on deeds to any land or real property anywhere in the world? If so, please give the information below:

A. Are you purchasing or do you own REAL PROPERTY? Yes / No

Please Circle One: Land with home or bare land, OR a Mobile Home with land or a Mobile Home in park. Address of property:____________________

Tax Assessed Value (necessary): $________________Year of assessment:__________

When purchased?________________ Amount purchased for: ________________

Your estimate of its full market value: $ ____________________

Do you owe property taxes? Yes / No If yes, how much and for what year(s):________________

Are your property taxes included in your mortgage payment? Yes / No

Which County? ____________________

B. DO YOU WANT TO RETAIN HOME? YES / NO

First mortgage monthly payment: $____________ Loan # ________________

How much behind? $____________Balance owed: $__________Interest Rate:__________

Name and address of lender:____________________

Foreclosure Date: (if any)____________________

Second mortgage monthly payment: $____________ Loan # ________________

How much behind? $____________Balance owed: $__________Interest Rate:__________

Name and address of lender: ____________________

Foreclosure Date: (if any) ____________________

Third mortgage: add same information on attached sheet____________________

C. Do you have another piece of real property? Yes / No If yes, attach sheet with above details.

6. Bank Information:

A. Safe deposit box? Yes / No If yes, where?____________________

What are contents? Any valuables? If yes, explain:____________________

____

B. Bank Accounts:

	Name of Bank	Branch	Savings/Checking	Average Balance
1.				
2.				
3.				

WE **ADVISE CLIENTS TO CLOSE OUT ALL CREDIT UNION ACCOUNTS BEFORE FILING BANKRUPTCY OR LEAVE IN MINIMUM BALANCE IF THEY OWE MONEY TO THE CREDIT UNION**

7. Do you have a security deposit with a utility or landlord? Yes / No

How much is refundable and with whom?____

8. **ASSETS:** Your estimate value of the following (auction or garage sale value):

household goods / including audio, video, and computer equipment ________________________

books, pictures, art objects, antiques, stamp, coin, record, tape, cd,
or other collections ________________________

wearing apparel:______________________________ ________________________

furs and jewelry:______________________________ ________________________

sports, photographic, and other hobby equipment:___________ ________________________

9. Do you own any GUNS? Yes / No If yes, list each one. Describe whether it is a rifle, shot gun, or pistol with its respective value:____
____

10. Do you have LIFE INSURANCE? Yes / No Term / Whole life (Whole Life means it has cash value)
Value: $__________________ What company?____

11. Do you have an annuity? Yes / No If yes, describe:____

12. Do you have a RETIREMENT FUND with any employer, past or present? Yes / No
If yes, itemize and how much:____

Do you have a LOAN against any retirement fund, and if yes, how much?________________________

13. Do you own any STOCKS OR BONDS other than retirement? Yes / No Value: $_______________
What company?____

14. Do you have an interest in a partnership / joint venture? Yes / No If yes, itemize:_______________
____

15. Do you have government bonds or negotiable instruments? Yes / No If yes, itemize:_____________
____

16. Does anyone owe you any money or accounts receivable? Yes / No If yes, itemize:_____________
____

17. Are you entitled to past-due child support / alimony? Yes / No
If yes, state how much you are due and from whom?___________________________________

18. Are you entitled to an equitable or future interest, life estate, interest in an insurance policy, trust or any other claim of every nature - patent, copyright, license, franchise, or other intangible?
Yes / No If yes, describe:____

19. Do you have a claim for PERSONAL INJURY or WORKERS' COMP? Yes / No
If yes, list the name, address, and phone number of the attorney who represents you and what you believe to be the value of your claim: ____
____

20. Please Complete All Information Describing Your Vehicle(s)

Year	Make	Model	Cylinders	Style	# Doors	Mileage	Est. Value	Name on Title

21. Do you own a boat, motorcycle, camper, trailer, aircraft, or more than four cars not listed in prior question: Yes/ No If yes, list what and value (attach sheet if necessary):________________________
____

22. Do you have any office equipment, fixtures, or supplies used in business? Yes / No If yes, describe and list values:____
____

23. Do you have inventory in the business?____

24. Do you own any animals with a total value over $300.00? Yes / No If so, describe type of animal and its value.____

25. Do you have any crops, farming equipment, and supplies? Yes / No If yes describe and what is your estimate of value?____

26. Do you have any UNUSUAL ASSETS, SUCH AS ANTIQUE COLLECTIONS, COIN OR STAMP COLLECTIONS ETC. Yes / No If yes, please describe with your estimate of value.__________________
____
____

27. Has anyone left you an INHERITANCE? Yes / No If yes, who and how much? Please provide particulars_
____
____

28. Do you anticipate anyone dying and leaving you an inheritance within the next 6 months? Yes / No. If yes, describe and consult with our office ____
____

29. Do you have any OTHER ASSETS not listed here of significant value, for example, tools, art collection, equipment, trailer, boat, Manufactured home or Mobile Home etc.? Yes / No If yes, please provide particulars with your estimate of value (attach list if necessary) ________________________________
____
____
____
____

30. Taxes:

A. Are you entitled to a tax refund? This includes next year if you are filing Bankruptcy after September 1. Yes /No **MUST ANSWER**, estimate if necessary.

If yes, how much? Federal $______________________________State $______________________

In which state were tax returns filed for last two years?____________________________________

If your tax refunds are over $500.00 the trustee may claim the refund. Discuss this with the attorney.

B. Did you receive a tax refund in the last two years? Yes / No If yes, what year and how much received?

Federal – Year 20__ Amount $________ Federal- Year 20__ Amount $_______
State – Year 20__ Amount $________ State – Year 20__ Amount $_______
Homeowners - $____________________

31. TAXES OWING (Estimate if exact amounts are not known; however, YEARS AND DATES MUST ACCURATE).

Year	Returns Filed	Amount Owing IRS	Amount Owing State	Amount Owing Other State	Lien Filed?
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No
20__	Yes/No				Yes/No

Continue on in earlier years if returns have not been filed or if taxes remain owing.

A. Are you anticipating owing taxes for the next calendar year? Yes / No If yes, how much?_______
____

If you will not be able to pay this sum you should contact your attorney or the appropriate paralegal regarding options prior to this bankruptcy case being filed.

B. Was a tax return filed late? Yes / No, If so, give us the tax year; and day, month, and year the return was filed.____

C. Was a tax return filed by the IRS or State Taxing Agency on your behalf? Yes / No If so, what tax agency and what year? ____

ATTACH A COPY OF ANY AND ALL DOCUMENTS RELATING TO TAXES OWED!

32. SECURED LOANS (IMPORTANT - FILL OUT COMPLETELY REGARDLESS OF WHETHER YOU ARE KEEPING OR SURRENDERING PROPERTY) (i.e., car, furniture, jewelry, property taxes, home, etc.).

Description & Date Acquired	Example: 2001 Ford				
Name of Creditor and Address	US National Bank: Address:				
Loan Number	#12345678				
Interest Rate	9%				
Value	$15,000.00				
Current Balance	$18,000.00				
Amount of Monthly Payments	$450.00				
How many months behind?	3 mos.				
Do you want to keep items?	Yes				
Is there a co-signer? If yes, name, address, and relationship	Joe Smith 1 Main Street Salem OR 97303 Uncle				

PLEASE REMEMBER WE CANNOT LIST ANY CREDITOR UNLESS WE HAVE FULL COMPLETE ADDRESSES WITH ZIP CODES

U N S E C U R E D C R E D I T O R S
(Example: medical bills, charge cards,
unsecured loans, utility bills, etc.)

PLEASE SPECIFY IF DEBT IS A BUSINESS DEBT. PLEASE, PRINT, AND FILL IN ADDRESSES FULLY AND CAREFULLY, LIST THE TOTAL AMOUNT DUE, NOT THE MONTHLY PAYMENT. INCLUDE ACCOUNT NUMBER!

Name and Address of Creditor	Account Number	Type of Debt and Years Incurred (medical, credit card, collection, etc.)	Amount Owed	Co-Signer

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STATEMENT OF AFFAIRS

1. Income from employment or operation of business □ **None** State the gross amount of income the debtor has received from employment, trade, or profession, or from operation of the debtor's business from the beginning of this calendar year to the date this case was commenced. State also the gross amounts received during the two **years** immediately preceding this calendar year. (A debtor that maintains, or has maintained, financial records on the basis of a fiscal rather than a calendar year may report fiscal year income. Identify the beginning and ending dates of the debtor's fiscal year.) If a joint petition is filed, state income for each spouse separately. (Married debtors filing under chapter 12 or chapter 13 must state income of both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Attach pay stubs received in the past sixty (60) days.* *Attach copies of your tax returns for the past two Years.* *Indicate the amount and source of income for this year-to-date, last year, and two years ago.*
2. Income other than from employment or operation of business □ **None** State the amount of income received by the debtor other than from employment, trade, profession, operation of the debtor's business during the **two years** immediately preceding the commencement of this case. Give particulars. If a joint petition is filed, state income for each spouse separately. (Married debtors filing under chapter 12 or chapter 13 must state income for each spouse whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Did you sell anything, receive any benefits such as unemployment insurance, or have any gambling winnings?* *Indicate the amount and source of income for this year-to-date, last year, and two years ago*
3. Payments to creditors ***Complete a. or b., as appropriate, and*** *c.* □ **None** *a. Individual or joint debtor(s) with primarily consumer debts:* List all payments on loans, installment purchases of goods or services, and other debts to any creditor made within **90 days** immediately preceding the commencement of this case if the aggregate value of all property that constitutes or is affected by such transfer is not less than $600. Indicate with an asterisk (*) any payments that were made to a creditor on account of a domestic support obligation or as part of an alternative repayment schedule under a plan by an approved nonprofit budgeting and creditor counseling agency. (Married debtors filing under chapter 12 or chapter 13 must include payments by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.) □ **None** *b. Debtor whose debts are not primarily consumer debts:* List each payment or other transfer to any creditor made within **90 days** immediately preceding the commencement of the case if the aggregate value of all property that constitutes or is affected by such transfer is not less than $5,000. (Married debtors filing under chapter 12 or chapter	*Indicate the name and address of the creditor, dates of payment(s), amount paid, and amount still owing.* *Indicate the name and address of the creditor, dates of payment(s) or transfers, amount paid, and amount still owing.*

□ **None** *c. All debtors:* List all payments made within **one year** immediately preceding the commencement of this case to or for the benefit of creditors who are or were insiders. (Married debtors filing under chapter 12 or chapter 13 must include payments by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the recipient's name, address, and relationship, dates of payment(s), amount paid, and amount still owing.*
4. Suits and administrative proceedings, executions, garnishments and attachments □ **None** a. List all suits and administrative proceedings to *which* the debtor is or was a party within **one year** immediately preceding the filing of this bankruptcy case. (Married debtors filing under chapter 12 or chapter 13 must include information concerning either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the caption of the suit, case number, nature of proceeding, court and location, and the status or disposition.*
□ **None** b. Describe all property that has been attached, garnished or seized under any legal or equitable process within **one** year immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include information concerning property of either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of person for whose benefit the properly was seized, date of seizure and description and value of property.*
5. Repossessions, foreclosures and returns □ **None** List all property that has been repossessed by a creditor, sold at a foreclosure sale, transferred through a deed in lieu of foreclosure or returned to the seller, within **one year** immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include information concerning property of either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of the creditor or seller, date of repossession, foreclosure sale, transfer or return, and description and value of property.*
6. Assignments and receiverships □ **None** a. Describe any assignment of property for the benefit of creditors made within **120 days** immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include any assignment by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and joint petition is not filed.)	*Indicate the name and address of the assignee, date of assignment, and terms of assignment or settlement.*
□ **None** b. List all property which has been in the hands of a custodian, receiver, or court-appointed official within **one year** immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include information concerning property of either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of the custodian, name and location of court, case title and number, date of order, and description and value of property.*

7. Gifts □ **None** List all gifts or charitable contributions made within **one year** immediately preceding the commencement of this case except ordinary and usual gifts to family members aggregating less than $200 in value per individual family member and charitable contributions aggregating less than $100 per recipient. (Married debtors filing under chapter 12 or chapter 13 must include gifts or contributions by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of the recipient, relationship to debtor if any, date of gift, and description and value of gift.*
8. Losses □ **None** List all losses from fire, theft, other casualty or gambling within **one year** immediately preceding the commencement of this case **or since the commencement of this case.** (Married debtors filing under chapter 12 or chapter 13 must include losses by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the description and value of the property, description of circumstances and, whether the loss was covered in whole or in part by insurance, and the date of the loss.*
9. Payments related to debt counseling or bankruptcy □ **None** 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 bankruptcy law or preparation of a petition in bankruptcy within **one year** immediately preceding the commencement of this case.	*Indicate the name and address of the payee, date of payment, name of owner if other than debtor, and the amount of money or* ***description and value*** *of property.*
10. Other transfers □ **None** a. 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 within **two years** immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include transfers by either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.) □ **None** b. List all property transferred by the debtor within **ten years** immediately preceding the commencement of this case to a self-settled trust or similar device of which the debtor is a beneficiary.	*Indicate the name and address of transferee, relationship to debtor, date, and description of property transferred and value received.* *Indicate the name of the trust or other device, date(s) of transfer(s), amount of money or description and value of property or debtor's interest in property.*

11. Closed financial accounts □ **None** List all financial accounts and instruments held in the name of the debtor or for the benefit of the debtor which were closed, sold, or otherwise transferred within **one year** immediately preceding the commencement of this case. Include checking, savings, or other financial accounts, certificates of deposit, or other instruments; shares and share accounts held in banks, credit unions, pension funds, cooperatives, associations, brokerage houses and other financial institutions. (Married debtors filing under chapter 12 or chapter 13 must include information concerning accounts or instruments held by or for either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of the institution, type and number of account and amount of final balance, and the amount and date of sale or closing.*
12. Safe deposit boxes □ **None** List each safe deposit or other box or depository in which the debtor has or had securities, cash, or other valuables within **one year** immediately preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include boxes or depositories of either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of bank or other depository, names and addresses of those with access to box or depository, description of contents, and date of transfer or surrender, if any.*
13. Setoffs □ **None** List all setoffs made by any creditor, including a bank, against a debt or deposit of the debtor within **90 days** preceding the commencement of this case. (Married debtors filing under chapter 12 or chapter 13 must include information concerning either or both spouses whether or not a joint petition is filed, unless the spouses are separated and a joint petition is not filed.)	*Indicate the name and address of the creditor, date of setoff and amount of setoff*
14. Property held for another person □ **None** List all property owned by another person that the debtor holds or controls.	*Indicate the name and address of the owner, description and value of property, and the location of the property.*
15. Prior address of debtor □ **None** If debtor has moved within three **years** immediately preceding the commencement of this case, list all premises which the debtor occupied during that period and vacated prior to the commencement of this case. If a joint petition is filed, report also any separate address of either spouse.	*Indicate the address, name used, and dates of occupancy.*

16. Spouses and Former Spouses □ **None** If the debtor resides or 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 eight years immediately preceding the commencement of the case, identify the name of the debtor's spouse and of any former spouse who resides or resided with the debtor in the community property state.	*Indicate the name.*
17. **Environmental Information** For the purpose 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 of 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. □ **None** 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 or 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.	*Indicate the site name and address, name and address of governmental unit, date of notice, and if known, the environmental law.*
□ **None** 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.	*Indicate the site name and address, name and address of governmental unit, date of notice, and if known, the environmental law.*
□ **None** 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.	*Indicate the name and address of governmental unit, docket number, and status or disposition.*

PLEASE COMPLETE ATTACHED BUDGET AS COMPLETELY AND ACCURATELY AS POSSIBLE: BUDGET IS CALCULATED MONTHLY, IF PAID WEEKLY OR BI-WEEKLY PLEASE CALCULATE WITH YOUR ENTIRE MONTHLY GROSS INCOME!

INCOME

Employment Income:	Debtor	Joint Debtor
Current Monthly Gross Income	$__________________	$__________________
Estimate Monthly Overtime	$__________________	$__________________
Subtotal of Wages	$__________________	$__________________

Deductions:

State & Federal Taxes, FICA, SSI, etc.	$__________________	$__________________
Insurance	$__________________	$__________________
Union Dues	$__________________	$__________________
Other Deductions (SPECIFY) ________________________________ ________________________________	$__________________	$__________________
Subtotal of Deductions	$__________________	$__________________
Income from operation of Business, Profession, or Farming	$__________________	$__________________
Income from Real Property	$__________________	$__________________
Interest & Dividends	$__________________	$__________________
Alimony, Child Support paid to you for dependents in your care.	$__________________	$__________________
Social Security, or Government Assistance (PLEASE SPECIFY)	$__________________	$__________________
Pension	$__________________	$__________________
Any Other Monthly Income (SPECIFY)	$__________________	$__________________

Do you expect any significant income changes in the next 24 months?______________________________

____

EXPENSES

Rent or Mortgage Payments (Include Space Rent) $____________
Are real estate taxes included in payment? Yes_____ No ___
Is property insurance included in payment? Yes_____ No ___

UTILITIES:
Electricity & Heating Cost (gas, electric, oil) $____________
Water & Sewer $____________
Telephone $____________
Garbage, cable, satellite, cell phone, alarm system, $____________
PO Box, internet, (CIRCLE all that apply) $____________

Child care expenses $____________

Home Maintenance $____________

Food $____________

Clothing Purchases $____________

Laundry & Dry Cleaning Expenses $____________

Medical & Dental Expenses $____________

Transportation Expenses $____________

Recreation & Entertainment $____________

Charitable Contributions $____________
If more than $50 per month, list name & address of recipient:
____

INSURANCE:

Homeowners or Renters $____________
Life $____________
Health $____________
Auto $____________
Other (SPECIFY) $____________
Taxes (property taxes, self employment taxes) $____________

INSTALLMENT PAYMENTS:
Auto # 1 $____________
Auto #2 $____________
Other (SPECIFY)_________________________ $____________

Alimony or Support Payments paid to others $____________

Regular expenses from operation of business etc. $____________

Do you expect any significant expense changes in the next 24 months?______________________________
____