Law Offices of

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"FRESH START --<>-- BANKRUPTCY QUESTIONNAIRE"

| How d | al Status: □ Single □ Ma lo you want to file? □ Ho you lived at the same addro you EVER filed Bankrupto | usband Only ess for 6 month cy: \(\text{Yes} \(\text{N} \) | ☐ Wife Only as, or longer: ☐ o (Date Filed: | ☐ Joint Yes ☐ Ch | ☐ Single No |
|-------|--|--|---|------------------|-------------------|
| DEBT | COR: (Husband is Debtor and W | ife is Joint Debtor | •) | | |
| 1. | Name: | | | | (Full LEGAL name) |
| 2. | Other Names Used in the last | 8 years: | | | |
| 3. | Social Security Number: | | | State Is | ssued: |
| 4. | Date of Birth: | | | | |
| 5. | Address: | | | _County: _ | |
| 6. | City: | | State: | | Zip: |
| 7. | Phone: Home: | Cell: | | _ Cell: | |
| 8. | E-mail Address: | | | | |
| 9. | Employer Name: | | Previous Emp | oloyer: | |
| 10. | Mortgage Company: | | Auto Loan Com | npany: | |
| JOIN' | Γ DEBTOR: (Husband is Deb | tor and Wife is Jo | int Debtor) | | |
| 1. | Name: | | | | (Full LEGAL name) |
| 2. | Other Names Used in the last | 8 years: | | | |
| 3. | Social Security Number: | | · | State Is | ssued: |
| 4. | Date of Birth: | | | | |
| 5. | Address: | | | | |
| 6. | City: | | State: | | Zip: |
| 7. | Phone: Home: | Cell: | | _Cell: | |
| 8. | E-mail Address: | | | | |
| 9. | Employer Name: | | Previous Emp | oloyer: | |
| 10. | Mortgage Company: | | Auto Loan Com | nnany: | |

REAL PROPERTY

| Address: | □ None (I Rent) | | | | |
|---|--------------------------------|---------------------|--|--|--|
| State: | | | | | |
| Value of Property: | | | | | |
| Mortgage Loans: | | | | | |
| Lender Name: | Monthly Payment: \$ | Months Behind: # | | | |
| Principal Balance of Loan: \$ | Amount Past Due (Arrears): \$ | | | | |
| Lender Name: | Monthly Payment: \$ | Months Behind: # | | | |
| Principal Balance of Loan: \$ | Amount Past Due (Arrears): \$ | | | | |
| Property Tax: ☐ Paid in Mortgage <i>OR</i> \$ | Monthly Yearly - | Amount Past Due: \$ | | | |
| Insurance: \Box Paid in Mortgage $OR \$$ _ | \Boxed Monthly \Boxed Yearly - | Amount Past Due: \$ | | | |
| Home Owners Association: \$ | | | | | |
| Other Real Property: (Vacant Lot, Address: | | | | | |
| City: State: | | | | | |
| Value of Property: | | | | | |
| Mortgage Loans: | | | | | |
| Lender Name: | Monthly Payment: \$ | Months Behind: # | | | |
| Principal Balance of Loan: \$ | Amount Past Due (Arrears): \$ | | | | |
| Lender Name: | Monthly Payment: \$ | Months Behind: # | | | |
| Principal Balance of Loan: \$ | Amount Past Due (Arrears): \$ | | | | |
| Property Tax: \Box Paid in Mortgage OR \$ | Monthly Yearly - | Amount Past Due: \$ | | | |
| Insurance: \Box Paid in Mortgage $OR \$$ | Monthly Yearly - | Amount Past Due: \$ | | | |
| Home Owners Association: \$ | | | | | |
| Monthly Rental In | ncome : \$ | | | | |
| <u> Timeshare:</u> | □ Non | e | | | |
| Description: | Cash Value: | | | | |
| Secured Loans: | | | | | |
| | Monthly Loan Payment: \$ | Maintenance Fee: \$ | | | |
| Principal Balance of Loan: \$ | Amount Past Due (Arrears): \$ | Months Behind: # | | | |
| Lender Name: | | | | | |

PERSONAL PROPERTY

Automobiles and Other Vehicles:

| 1) Year: | Make: | M | odel: | Trim: | Mileage: | |
|---------------------------------|---|--|-----------------------------|----------------|--------------|----------------|
| ☐ Free and Clea | ar: | Estimated VAL | UE:\$ | | XLT, SL) | |
| ☐ Financed: | Balance of Loa Date of Last Pa | any: an: \$ ayment: (Loan Paid Keep Vehicle and I | Amount Off) | Past Due: \$_ | | Discharge Debt |
| ☐ Leased: | Date of Last Pa | y: yment: (Lease end o Keep Vehicle and A | late) | | | |
| 2) Year: | Make: | M | odel: | Trim: | Mileage: | |
| ☐ Free and Clea | ar: | Estimated VAL | UE:\$ | (XL, | XLT, SL) | |
| ☐ Financed: | Balance of Loa Date of Last Pa | any: n: \$ nyment: (Loan Paid Keep Vehicle and I | Amount Off) | Past Due: \$ | | Discharge Debt |
| ☐ Leased: | Lease Compan Date of Last Pa Intention: | y: yment: (Lease end o Keep Vehicle and A | Monthly date) Monthly date) | y Payment: \$_ | Mon | ths left: |
| Other Vehicl (Motorcycles, B | | ilers, RV's, Jet Ski' | s, etc.) | □ None | | |
| Item Description | ı: Make: | Mod | | Trim | Size/length: | |
| ☐ Free and Clea | | | UE:\$ | | | |
| ☐ Financed: | Balance of Loa Date of Last Pa | any: an: \$ nyment: (Loan Paid Keep Vehicle and I | Amount Off) | Past Due: \$_ | | Discharge Debt |
| ☐ Leased: | Date of Last Pa | y: yment: (Lease end o Keep Vehicle and A | late) | | | |

| Cash on Hand: \$ | | | |
|---|--|--|-------------------|
| Checking and Savings Acco | ounts: | Total Balance of all Accounts \$_ | |
| Union will freeze your ac | counts upon notice se remove your fun | specifically Wells Fargo and Nav of a Bankruptcy filing. If you ha ads immediately and do not use th | ive an account at |
| General Household Goods | and Furniture: | Total Value of All \$ | |
| Personal Clothing Items: | | Total Value of All \$ | |
| Art, Collectibles, Firearms | , Sports Equip, | Photography Equip, etc.: | □ None |
| Item: | Value: \$ | Item: | Value: \$ |
| Item: | Value: \$ | Item: | Value: \$ |
| Jewelry, Watches, Weddin | g Rings: | | □ None |
| Item: | Value: \$ | Item: | Value: \$ |
| Item: | Value: \$ | Item: | Value: \$ |
| Animals / Pets: | | | □ None |
| Item: | Value: \$ | Item: | Value: \$ |
| | | | |
| Retirement Accounts, 4011 | X, 403b, Pension | ns, IRA: | □ None |
| Type: | Amount: | \$ | |
| Type: | Amount: | \$ | |
| Life Insurance: | | | □ None |
| Company Name: Term Policy (No Cash Value) | , | Cash Value – Ability to Borrow fro render Value (Cash Value): \$ | |
| Company Name: ☐ Term Policy (No Cash Value) | | Cash Value – Ability to Borrow from render Value (Cash Value): \$ | |

| Alimony, Child Support | , Divorce Judgment (| Owed to You): | □ None |
|--|-----------------------------|--------------------|--|
| Type: | Amount: \$ | Туре: | Amount: \$ |
| <u>Tax Refund</u> (List your m | ost current tax refund 1 | received) | □ None |
| Federal Refund Amount: \$ | Date | e Refund Received: | |
| State Refund Amount: \$ | Date | e Refund Received: | |
| Stocks, Bonds, Business | Interest: | | □ None |
| tem: | Shares: # | Value: \$ | |
| (tem: | Shares: # | Value: \$ | |
| Claims for Personal Inju | ıry/Workers Compen | sation/etc.: | □ None |
| Туре: | | Value: \$ | |
| ANY OTHER PROPER | TY OF VALUE NOT | LISTED AROVE: | □ None |
| Гуре: | | | |
| Туре: | | | |
| Туре: | | | |
| | | VEODMATION | |
| <u>Debtor:</u> | FINANCIAL II | NFORMATION | |
| Employer Name: | | | _ |
| Address: | | | _ Unemployed |
| City: | State: | Zip: | _ Disabled |
| Job Title: | | | _ Retired |
| Length of Employment: | | | - |
| Joint Debtor (and/or Special of the second o | one spouse is filing Bankru | | provide all income, assets, and iling Bankruptcy with you!) |
| Employer Name: | | | _ ☐ Homemaker |
| Address: | | | _ Unemployed |
| City: | State: | Zip: | _ Disabled |
| Job Title: | | | _ Retired |
| Length of Employment: | | | |

<u>Dependents:</u> (Must live with you and you provide more than 50% of their support)

| ☐ Male ☐ Female Relationship: | | | _ | | | |
|--|----------|---------|--------|----------|--------------------------------|-----------|
| Age: (If over 18 then check: | Disabled | □ F/T S | tudent | □ Other: | | _) |
| ☐ Male ☐ Female Relationship: | | | _ | | | |
| Age: (If over 18 then check: \Box | Disabled | □ F/T S | tudent | □ Other: | | _) |
| ☐ Male ☐ Female Relationship: | | | _ | | | |
| Age: (If over 18 then check: \square | Disabled | □ F/T S | tudent | ☐ Other: | | _) |
| Pay Period: Debtor: Joint Debtor: | □ Weekly | | • | | ☐ Twice a Month☐ Twice a Month | |
| MONTHLYIncome: | | D | ebtor: | | Joint Debtor | (Spouse): |
| Employment Income | | \$ | | | \$ | |
| Self-Employment Income | | \$ | | | \$ | |
| Business Income | | \$ | | | \$ | |
| Rental Income | | \$ | | | \$ | |
| Alimony | | \$ | | | \$ | |
| Child Support | | \$ | | | \$ | |
| Pension or Retirement Income | | \$ | | | \$ | |
| SSI/ Retirement | | \$ | | | \$ | |
| SSI/ Disability | | \$ | | | \$ | |
| SSI/ Death Benefits | | \$ | | | \$ | |
| EDD/Unemployment | | \$ | | | \$ | |
| EDD/Disability | | \$ | | | \$ | |
| Support from Family (Person: | | _) \$ | | | \$ | |
| Any other Income (Specify: | |) \$ | | | \$ | |

Monthly Expenses

| Rent or Home Mortgage Payment | \$ |
|---|----------|
| Property Taxes (☐ Already Included in Payment) | \$ |
| Insurance (Already Included in Payment) | \$ |
| HOA Dues (☐ Already Included in Payment) | \$ |
| Home Maintenance (Gardner, Pool Services, Etc.) | \$ |
| Electricity and Gas | \$ |
| Water, Sewer, Trash | \$ |
| Telephone, Cell Phone, Internet, Satellite, Cable | \$ |
| Other Utility: | \$ |
| Food and Housekeeping supplies | \$ |
| Clothing, Laundry, Dry Cleaning | \$ |
| Personal Care Products and Services | \$ |
| Out-of-Pocket Medical/Dental Expenses: (Co-pays, Prescriptions, etc.) | \$ |
| Child Care Expenses | \$ |
| Minor Children's School Expenses: (Supplies, Field Trip, Sports, etc.) | \$ |
| Insurance: | • |
| Life (Not Deducted from Pay Check) | \$ |
| Health (Not Deducted from Pay Check) | \$ |
| Auto | \$ |
| Loans: Auto Loan Payment: | \$ |
| · | |
| Student Loan Payment: | \$ |
| Charitable Contributions: (Donations, Church Tithes, etc.) | \$ |
| Alimony or Child Support (Not Deducted from Pay Check) | \$ |
| Past Due Taxes IRS Installment Agreement (Debt Owed to IRS Year:\$) CA Installment Agreement (Debt Owed to IRS Year:\$) | \$ \$ |
| Any other Expense (Specify:) | \$ |
| Any other Expense (Specify:) | \$ |

<u>YEARLY INCOME:</u>
List any and all money received from any source within the last three years (ex. Wages, Self-Employment, Business Income, SSI, Pension, Unemployment, Support, etc.),

| Current Ye | ar (to Date): | | | |
|------------------------|--------------------|--|--|---------------------|
| □ Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| Last Year: | | | | |
| □ Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| Two Years | Ago: | | | |
| | ☐ Joint Debtor | Source: | | Amount: \$ |
| □ Debtor | ☐ Joint Debtor | | | Amount: \$ |
| \square Debtor | ☐ Joint Debtor | Source: | | Amount: \$ |
| \square Debtor | ☐ Joint Debtor | | | Amount: \$ |
| Creditor: Creditor: | D | Oate Paid: Oate Paid: Oate Paid: | Amount: \$ Amount: \$ Amount: \$ | Balance of debt: \$ |
| Creditor: | D | Pate Paid: | Amount: \$ | Balance of debt: \$ |
| Monthly C | haritable Organiza | ation or Church | | □ None |
| Name: | | | | |
| Address: | | | | |
| City: | | State: | | Zip: |
| Relationship t | o Debtor (if any): | | | |
| Monthly Amo | ount: \$ | | | |
| Have you (| Closed any Bank A | ccounts within th | e last year. | □ No |
| Bank Name:_ | | | | |
| Address: | | | | |
| City: | | State: | | Zip: |
| Type of Acco | unt: | Account Number: _ | | |
| Final Balance | : | Amount of Sale/Date | of Closing: | |

| <u>Prior addresses for tl</u> | <u> 1e last three years:</u> | □ None |
|-------------------------------|------------------------------------|--------------------------------|
| Dates: | Address: | |
| Dates: | Address: | |
| Dates: | Address: | |
| Spouse and/or Forme | er Spouses within the last eight y | <u>vears</u> |
| Name: | Divorce | Date (If Applicable): |
| Name: | Divorce | Date (If Applicable): |
| Are you a Co-Signer | or Co-Debtor on any Loans or A | Accounts: |
| Property Description: (Aut | o, etc.) | |
| Lender: | Mo | onthly Payment: \$ |
| Person you co-signed for (| Name): | |
| Address: | | |
| | State: | |
| Have you transferred | l or given away any Property in | the last two years: |
| Description of Property: _ | | |
| Date of Transfer: | Value of Prop | perty: |
| Γransferred to (Name): | | |
| Address: | | |
| City: | State: | Zip: |
| Repossessions, Forec | losure/ Short Sale of any Proper | ty within the last year None |
| Description of Property/Ad | ldress: | |
| Date: | Creditor/Lender: | |
| Party to any Lawsuit | s within the last year | □ None |
| Case Name: | | |
| Case Number: | Court Locati | ion: |
| Case Status: | | |
| Wage Garnishment | | □ None |
| ☐ Received Notice of | of a Wage Garnishment | |
| □ Wages already Ga | arnished (Creditor: |) |
| Date of Garnishm | ent: Amo | ount Taken: \$ |

YOU MUST LIST all businesses in which the debtor was an officer, director, partner, or managing executive of a corporation, partner in a partnership, sole proprietor, or was self-employed in a trade, profession, or other activity either full- or part-time within the last SIX YEARS. If you have more than one business use a separate sheet for each business!

BUISNESS OWNER OR SELF-EMPLOYMENT INFORMATION SHEET

| Business Name (DBA): | | | |
|---|-------------|---------------|----------------|
| Address: | | | |
| City: | State: | | Zip: |
| Nature of Business: | | | |
| Business Tax Id No: | | | |
| Beginning Date: | | Ending Date: | |
| | | | |
| Value of Business Assets: | \$ | | \square None |
| Value of Business Inventory: | \$ | | □ None |
| Value of Business Equipment/To | ols: \$ | | □ None |
| Accounts Receivables: | \$ | | □ None |
| Other: | \$ | | |
| TOTAL VALUE OF BUISNES | | | |
| Business Name:Address: | | | |
| City: | State: | | Zip: |
| Nature of Business: | | | |
| □ S-Corp □ C | Corporation | ☐ Partnership | |
| Business Tax Id No: | | | |
| Beginning Date: | | Ending Date: | |
| Debtor Title | | □ Non | e |
| Debtor Title: (CEO, President, Secretary | | | |
| Nature of Interest: | _ | | Dates: |
| Shares of Stocks # | value of S | tock \$ | |
| Joint Debtor Title:(CEO, President, Secretary | etc.) | | e |
| Nature of Interest: | | of Interest: | Dates: |
| Shares of Stocks # | Value of S | tock \$ | |

PROFIT AND LOSS STATEMENT

(For Business Owners or self-employed debtors only)

| | (Business N | | | |
|-------------------------------------|--------------|--------------|--------------|--------------|
| | (Month/Year) | (Month/Year) | (Month/Year) | (Month/Year) |
| Income: (Monies Received) | \$ | \$ | \$ | \$ |
| Expenses: | | | | |
| Advertising | \$ | \$ | \$ | \$ |
| Business Supplies Bought | \$ | \$ | \$ | \$ |
| Independent Contractors Paid | \$ | \$ | \$ | \$ |
| Wages Paid | \$ | \$ | \$ | \$ |
| Legal/Professional Fees | \$ | \$ | \$ | \$ |
| Liability Insurance | \$ | \$ | \$ | \$ |
| Inventory Purchased | \$ | \$ | \$ | \$ |
| Membership/Dues | \$ | \$ | \$ | \$ |
| Office Lease/Rent (Not Home) | \$ | \$ | \$ | \$ |
| Office Utilities (Not Home) | \$ | \$ | \$ | \$ |
| Car Expense (Not Personal Car) | \$ | \$ | \$ | \$ |
| | \$ | \$ | \$ | \$ |
| | \$ | \$ | \$ | \$ |
| Net Profit: (Income minus Expenses) | \$ | \$ | \$ | \$ |

(DO NOT include any expenses that may also be considered a personal expense, such as: medical insurance; home office rent, mortgage and/or utilities percentage; auto expenses, gas, repairs, mileage insurance, etc. for a vehicle that is also used for personal use; cell phones; etc. We will account for these expenses but they should be listed under your personal family expenses NOT business expenses)