

CLIENT QUESTIONNAIRE

Please answer ALL questions and give complete information. If married, give complete information for both spouses, even if only ones obligations (bills) are involved. The correct and complete addresses are particularly important! Thank you.

Referred by: Website/Internet ___ Friend: _____ Yellow Pages: _____ Other: _____
Previous Client: _____



1. FILER #1 FULL NAME: _____
FIRST MIDDLE LAST
Driver's License No.: _____

2. FILER #2 FULL NAME: _____
FIRST MIDDLE LAST
Driver's License No.: _____

3. List any other names you have used during the past 8 years (including maiden/previous marriage, nicknames, etc.)

Current marital Status: _____

4. Filer #1 Social Sec. # _____ Date of Birth _____

5. Filer #2 Social Sec. # _____ Date of Birth _____

6. Residence Address: _____
Street County
City State Zip

Alternate Residence or PO Box (If living separately) :

Street County
City State Zip

7. Telephone: () _____ Hm. If no phone, list a nearby number
Filer #1 Cell: () _____ (friend or relative) and "X" here. ()
Filer #2 Cell: () _____

7a: List residency information for the last 3 years (give addresses and dates)

Your email address: _____

Have you ever filed bankruptcy before? Yes _____ No _____ When _____

Where? _____ What Chapter? _____

12. Self – Employment Information:

Name of Business: _____

Address: _____

Street

City

State

Zip

Style of Business: Individual _____ Partnership _____

Corporation _____

Type of Business :

When began business: _____

Gross Income for past 2 years:

20__ : \$ _____ and 20__ : \$ _____

Questions relating to your residence and / or real estate:

13. Do you own or rent your residence ? Own _____ Rent _____

14. Type of residence :

Manufactured Home: _____ Home: _____ Apartment: _____

Amount of monthly payment: \$ _____

Payment Current? Yes _____ No _____

Amount Behind: \$ _____

**Are you a member of a Home Owners Association (HOA): _____

15. If you own: Value of House? \$ _____

How did you determine this value: Appraisal _____ Tax

Assessment _____ Other (explain) _____

Amount you feel you could sell for? \$ _____

Balance Owing:

To Whom:

1st Mortgage \$ _____

2nd Mortgage \$ _____

Delinquent
Property Taxes \$ _____

TOTAL PROPERTY DEBT \$ _____

16. Do you want to retain all of the property? Yes _____ No _____

17. Is any land divisible from the residence? Yes _____ No _____

Questions relating to Vehicles you OWN or are BUYING?

18. Do you OWN _____, or ARE BUYING _____
or LEASING _____ a vehicle: Yes _____ No vehicle _____

Year/Make/Model _____ Resale Value\$ _____

How did you determine this value: Blue Book _____ Other _____

(explain) _____

Amount Owed \$ _____ Payment \$ _____

Amount Behind \$ _____ To Whom: _____

Year/Make/Model _____ Resale Value? _____

How did you obtain this value: Blue Book _____ Other _____

(explain) _____

Amount Owed \$ _____ Payment Amount \$ _____

Amount Behind \$ _____ To Whom: _____

**19. Questions relating to furniture, jewelry, appliances or equipment you are buying
in INSTALLMENT PAYMENTS?**

Description of Purchase: _____ Resale Value: \$ _____

How did you determine this value? _____

Amount Owed? \$ _____ Payment Amount? \$ _____

Amount Behind \$ _____ To Whom: _____

Description of Purchase: _____ Resale Value: \$ _____

How did you determine this value? _____

Amount Owed? \$ _____ Payment Amount? \$ _____

Amount Behind \$ _____ To Whom: _____

20. Do you owe any unpaid taxes (non real estate) to any government entity?
Yes _____ No _____

IRS \$ _____ Year(s): _____

*Did you file the return(s) by the due date?: Yes _____ No _____

**If no return was filed, was an extension filed? Yes _____ No _____

***If extension was filed, provide a copy of the extension

Who prepared the return: You _____ IRS _____ Tax Preparer _____

State of Oregon: \$ _____ Year(s): _____

*Did you file the return(s) by the due date?: Yes _____ No _____

**If no return was filed, was an extension filed? Yes _____ No _____

***If extension was filed, provide a copy of the extension

Who prepared the return: You _____ Tax Preparer _____

State of _____: \$ _____ Year(s): _____

*Did you file the return(s) by the due date?: Yes _____ No _____

**If no return was filed, was an extension filed? Yes _____ No _____

***If extension was filed, provide a copy of the extension

Who prepared the return: You _____ Tax Preparer _____

21. Are you expecting any income **TAX REFUND** for last year? Yes ___ No ___

IRS \$ _____ State: \$ _____

22. Are you due to receive money or property as an inheritance? Yes ___ No ___
Do you believe that might happen within the next six months? Yes ___ No ___

23. Do you anticipate in the near future incurring large medical expenses **NOT** covered by insurance? Yes _____ No _____

24. Are there any other co-signers or co-debtors for any of your loans?

Name of Co-signer:

Name of Lender:

25. Are you obligated to pay child support or spousal support to anyone outside of your home? Yes___ No___ Name of recipient:_____
- **Approximate amount in arrears: \$_____
26. If divorced, were you ordered to pay any of the joint debts incurred during the marriage? Yes___No___(If yes, please provide a copy of your divorce judgment.)
27. Do you owe any traffic tickets? Yes_____ No_____
- Amount: \$_____ County : _____
- Amount: \$_____ County : _____
28. Do you owe any restitution or fines associated with a criminal conviction?
- Yes _____ No_____
29. Do you have any unpaid student loans? Yes _____ No _____
- Who is the student loan being serviced by?_____
- How much is owed on the student loan?_____
30. Have you made any credit card *cash advances, balance transfers* or *purchases* over \$500.00 on one card within the last seventy (70) days? Yes___ No___ To Whom?_____
31. Have you repaid any creditors \$600.00 or more in the last 90 days? Yes_____ No_____
- Do you have any payments (other than household bills) on auto-pay? Yes___ No___
32. Have you repaid any family members money you owed to them within the last twelve (12) months? Yes_____ No_____
33. Are your wages being garnished at this time? Yes_____ No_____
- By Whom? _____When is next payday? _____
- How much has this creditor received in the last 90 days?_____
34. Are you a trustee or signor on anyone else's bank account?
- Yes___ No___ Who? _____

35. Is your name shown on anyone else's property?

Yes _____ No _____ Who? _____

36. Approximate number of unsecured creditors? (i.e., credit card debt, medical bills)

Number _____ Approximate amount? \$ _____

37. Do you have any unpaid NSF checks or checks returned noted "closed account"?

Yes _____ No _____ Number _____ Amount \$ _____

38. Do you have any payday loans that are currently unpaid? Yes _____ No _____
To Whom? _____

****PLEASE NOTE: NSF and returned "account closed" checks are not dischargeable in bankruptcy. You are still responsible for the face value of the check.****

39. Are you bonded for any reason by a bonding company or insurance company?

Yes _____ No _____

40. Do you have a bank account with a Credit Union?

Yes _____ No _____

Do you owe any money to this Credit Union?

Yes _____ No _____ Amount? \$ _____

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Please read the following information thoroughly and sign where indicated. All bankruptcy filers must sign this questionnaire and information sheet.

IMPORTANT INFORMATION ABOUT BANKRUPTCY ASSISTANCE SERVICES FROM AN ATTORNEY OR BANKRUPTCY PETITION PREPARER

If you decide to seek bankruptcy relief, you can represent yourself, you can hire an attorney to represent you, or you can get help in some localities from a bankruptcy petition preparer who is not an attorney. **THE LAW REQUIRES AN ATTORNEY OR BANKRUPTCY PETITION PREPARER TO GIVE YOU A WRITTEN CONTRACT SPECIFYING WHAT THE ATTORNEY OR BANKRUPTCY PETITION PREPARER WILL DO FOR YOU AND HOW MUCH IT WILL COST.** Ask to see the contract before you hire anyone.

The following information helps you understand what must be done in a routine bankruptcy case to help you evaluate how much service you need. Although bankruptcy can be complex, many cases are routine.

Before filing a bankruptcy case, either you or your attorney should analyze your eligibility for different forms of debt relief available under the Bankruptcy Code and which form of relief is most likely to be beneficial for you. Be sure you understand the relief you can obtain and its limitations. To file a bankruptcy case, documents called a Petition, Schedules, and Statement of Financial Affairs, as well as in some cases a Statement of Intention need to be prepared correctly and filed with the bankruptcy court. You will have to pay a filing fee to the bankruptcy court. Once your case starts, you will have to attend the required first meeting of creditors where you may be questioned by a court official called a 'trustee' and by creditors.

If you choose to file a chapter 7 case, you may be asked by a creditor to reaffirm a debt. You may want help deciding whether to do so. A creditor is not permitted to coerce you into reaffirming your debts. If you choose to file a chapter 13 case in which you repay your creditors what you can afford over 3 to 5 years, you may also want help with preparing your chapter 13 plan and with the confirmation hearing on your plan which will be before a bankruptcy judge. If you select another type of relief under the Bankruptcy Code other than chapter 7 or chapter 13, you will want to find out what should be done from someone familiar with that type of relief.

Your bankruptcy case may also involve litigation. You are generally permitted to represent yourself in litigation in bankruptcy court, but only attorneys, not bankruptcy petition preparers, can give you legal advice.

PLEASE NOTE FURTHER that all information that the debtor is required to provide with a petition and thereafter must be complete, accurate and truthful. All assets and liabilities must be completely and accurately disclosed, and the replacement value of assets must be listed after a reasonable inquiry to determine the value. Current monthly income and disposable income must be calculated after a reasonable inquiry to determine amounts. All information provided may be audited and failure to provide such information may result in dismissal of the bankruptcy case, or other sanction, including criminal sanction.

I/We have received, and read, and understood the foregoing information.

Client Signature(s):

Date: _____