HUTCHINSON LEGAL SERVICES, P.C.

BANKRUPTCY ASSESSMENT FORM

- Please accurately and fully complete this form prior to your appointment. This will save time at your appointment.
- All information provided will be kept strictly confidential under State Bar rules for lawyers.
- More information will be requested from you at your appointment.
- **ESTIMATE** ANY DOLLAR AMOUNTS, YOU DO **NOT** HAVE TO BE EXACT.

  You can provide us exact numbers later on. ROUND NUMBERS TO THE NEAREST DOLLAR.

NAME(S):_____ **DATE:**_____

1. Have you filed bankruptcy before? (If Yes, what year): _____
2. Will you be filing as an Individual or as a Married couple?_____
3. When do you want to file?_____
4. Main reason(s) for filing bankruptcy:_____

_____

5. Are you being Sued? List Creditor names, estimated amounts, and Court:_____

_____

6. Any Judgments? List Creditor names and estimated amounts:_____

_____

7. Have you been Garnished in the last 12 months? List Creditor names and estimated amounts:_____

_____

Any garnishments in the last 90 days ?_____

8. UN-SECURED DEBTS *(* If you do not have a type of debt below, put "NA" or " / ")*

	Amount Owed:	**Number of** Accounts/Cards:
Credit cards (including retail/dept. store) →	$_____	_____
Unsecured loans (traditional or online) →	$_____	_____
Overdrawn bank accounts →	$_____	_____
Repossessed vehicles →	$_____	_____
Professional service debts (e.g. CPA/Lawyer) →	$_____	_____
Medical debts →	$_____	_____
Friend / Acquaintance personal loans →	$_____	_____
Family personal loans →	$_____	_____
Pay day / Title loans →	$_____	_____
Old Landlord / Apartments →	$_____	_____
Past due Utility debts →	$_____	_____
Other →	$_____	_____
THIS Section's SUB-TOTAL $	_____	_____

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9. Non-Dischargeable Debts (Generally) **Amount Owed:** **Number of Accounts/Cards:**

Student loans	→	$_____	_____
Court fines/penalties – Parking/Traffic tickets	→	$_____	_____
Criminal Restitution	→	$_____	_____
Past due Child support	→	$_____	_____
Past due Spousal support	→	$_____	_____
Other:_____	→	$_____	_____
Federal taxes	→	$_____	Tax year(s): _____
State taxes	→	$_____	Tax year(s): _____

THIS Section's SUB-TOTAL $_____ _____

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10. Are you paying or receiving spousal or child support?_____

11. Have you filed all Federal and State tax returns required?_____

12. Have you paid loans back to family or friends in the past two (2) years?_____

13. Do you have any co-signers on your Debts? And if so, which debts?_____

14. Have you had a vehicle recently repo'ed? If so, do you want it back?_____

15. HOUSE / CONDO. / LAND *** List additional properties on a separate piece of paper.*

Do you own, or are you purchasing, a house, condominium, or land? ◯ Yes / No ◯ How many? _____

Do you want to Keep or Surrender your house? ◯ *Keep* / *Surrender* ◯

Market value: _____ Market value is based on?_____

1st Mortgage/Lien total: $_____; Loan Current? ◯ Yes / No ◯; Amount Behind: $_____

2nd Mortgage/Lien total: $_____; Loan Current? ◯ Yes / No ◯; Amount Behind: $_____

3rd Mortgage/Lien total: $_____; Loan Current? ◯ Yes / No ◯; Amount Behind: $_____

Are you facing Foreclosure? ◯ Yes / No ◯ Foreclosure date: _____

List any other liens against you property (property taxes /utility / judgment): _____

16. *VEHICLES* *(car, truck, motorcycle, scooter, trailer, boat, ATV, mobile home, RV, tractor, etc.)*

Fully Owned Vehicles (*i.e.*, no loan balance)

(1)_____ Est. Trade-in value: $_____ <> **(2)**_____ Est. Trade-in value: $_____

Year, Make, Model *Year, Make, Model*

Vehicles you have LOANS on.

_____ Est. Loan Balance: $_____; Loan Current? Yes / No; Amount Behind: $_____

Year, Make, Model Est. Trade-in value: $_____ *Circle* ☐ *Keep* ☐ *Surrender*][Monthly payment $_____

_____ Est. Loan Balance: $_____; Loan Current? Yes / No; Amount Behind: $_____

Year, Make, Model Est. Trade-in value: $_____ *Circle* ☐ *Keep* ☐ *Surrender*][Monthly payment $_____

_____ Est. Loan Balance: $_____; Loan Current? Yes / No; Amount Behind: $_____

Year, Make, Model Est. Trade-in value: $_____ *Circle* ☐ *Keep* ☐ *Surrender*][Monthly payment $_____

17. Are you making payments on any other SECURED items (Not a house or vehicle)? ◯ YES / NO ◯

"Secured" means *if you don't make your payments the creditor can legally take back the item you are buying*.

(Examples of secured financed items are: TV, computer, mattress, furniture, jewelry, tires, etc. Typical secured creditors can be: Les Schwab, Aaron's, Best Buy, Jewelry stores, etc.)

>> List SECURED Creditor names and estimated amounts owed (Do **Not** list any House or Vehicle loans):_____

_____

18. What is the balance today of your bank accounts and cash holdings? _____

19. Do you own a business? (If so, describe):_____

_____

20. Are you expecting someone to die in the next 7 months and may receive an inheritance or life insurance from it?_____

21. Have you transferred property/asset worth more than $500 to anyone in the past 2 years?_____

22. What is important for you to understand about bankruptcy today? _____

_____

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