



**Nnaka & Associates,  
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**A FULL SERVICE LAW FIRM**



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## BANKRUPTCY INTAKE SHEET

### I. BIOGRAPHIC INFORMATION

Will this be a joint bankruptcy petition? ( ) YES ( ) NO

If yes, include information for Husband and Wife; if no, include information only for yourself.

Husband's name & residence address \_\_\_\_\_

\_\_\_\_\_

Telephone number(s)

Home: \_\_\_\_\_

Work: \_\_\_\_\_

County of residence \_\_\_\_\_

Soc. Sec. No. \_\_\_\_\_

How long at this address? \_\_\_\_\_

Have you used any other name(s) in the last six years? If yes, please list here:

\_\_\_\_\_

Wife's name & residence address \_\_\_\_\_

\_\_\_\_\_

Telephone number(s)

Home: \_\_\_\_\_

Work: \_\_\_\_\_

County of residence \_\_\_\_\_

Soc. Sec. No. \_\_\_\_\_

How long at this address? \_\_\_\_\_

Have you used any other name(s) in the last six years (including maiden name)? If yes,

please list here: \_\_\_\_\_

Are you currently: Single? \_\_\_\_\_ Separated? \_\_\_\_\_ Married? \_\_\_\_\_ Divorced? \_\_\_\_\_

If married, how long? \_\_\_\_\_

If divorced, how long? \_\_\_\_\_

Note: If you are married, but separated from your spouse, please provide the spouse's name and address here

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please provide the names and ages of minor children living with you

Name \_\_\_\_\_ age \_\_\_\_\_

Name \_\_\_\_\_ age \_\_\_\_\_

Name \_\_\_\_\_ age \_\_\_\_\_

Please provide the names, ages, and amount of child support paid

Name \_\_\_\_\_ age \_\_\_\_\_ amount \$ \_\_\_\_\_

Name \_\_\_\_\_ age \_\_\_\_\_ amount \$ \_\_\_\_\_

Please list previous addresses for the last two years:

1. \_\_\_\_\_ how long? \_\_\_\_\_

2. \_\_\_\_\_ how long? \_\_\_\_\_

3. \_\_\_\_\_ how long? \_\_\_\_\_

## II. DEBTS

Do you owe any money to the Internal Revenue Service? ( ) No ( ) Yes

If yes, for which tax year(s)? \_\_\_\_\_ Approximately how much? \_\_\_\_\_

Do you owe any money to state tax authorities? ( ) No ( ) Yes

If yes, for what year(s)? \_\_\_\_\_ Approximately how much? \_\_\_\_\_

Do you have any unpaid student loans? ( ) No \_\_\_\_\_ ( ) Yes \_\_\_\_\_

If yes, approximately how much? \_\_\_\_\_

**III. EMPLOYMENT**

Husband's employer: \_\_\_\_\_

How long at this job? \_\_\_\_\_

Occupation? \_\_\_\_\_

How often you are paid: Weekly \_\_\_ 2x month \_\_\_ Every 2 weeks \_\_\_

Please provide your income per pay period: Gross: \_\_\_\_\_ Net: \_\_\_\_\_

Wife's employer: \_\_\_\_\_

How long at this job? \_\_\_\_\_

Occupation? \_\_\_\_\_

How often you are paid: Weekly \_\_\_ 2x month \_\_\_ Every 2 weeks \_\_\_

Please provide your income per pay period: Gross: \_\_\_\_\_ Net: \_\_\_\_\_

Have you received income from any other source than your job last year (for instance, social security, child support, workers' compensation, etc)? If yes, please provide the source and monthly amount here: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What amount of income have you made at your job as follows:

Husband: year-to-date: \_\_\_\_\_ Wife: year-to-date: \_\_\_\_\_

Husband Last Year: \_\_\_\_\_ Wife Last Year: \_\_\_\_\_

Husband Two Years Ago: \_\_\_\_\_ Wife Two Years Ago: \_\_\_\_\_

Note: If you have more than one job, please list year-to-date and income information for the last two years here: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IV. MONTHLY EXPENSES**

Rent \_\_\_\_\_

Real estate taxes \_\_\_\_\_

Electric \_\_\_\_\_

Home maintenance \_\_\_\_\_

Gas \_\_\_\_\_

Life insurance \_\_\_\_\_

Water \_\_\_\_\_

Health insurance \_\_\_\_\_

Phone \_\_\_\_\_

Auto insurance \_\_\_\_\_

Cable \_\_\_\_\_

Homeowner/rent ins \_\_\_\_\_

Trash \_\_\_\_\_

House payment \_\_\_\_\_

Car expenses \_\_\_\_\_

Food \_\_\_\_\_

Medical \_\_\_\_\_

Entertainment \_\_\_\_\_

Education \_\_\_\_\_

Clothing \_\_\_\_\_

Laundry \_\_\_\_\_

Child care \_\_\_\_\_

Other \_\_\_\_\_

Do you pay anyone spousal support? (alimony) ( ) Yes ( ) No

If yes, to whom and how much? \_\_\_\_\_

How much is your car payment every month?

Car #1: \_\_\_\_\_

Car #2: \_\_\_\_\_

Car #3: \_\_\_\_\_

Do you anticipate a substantial change in your expenses in the immediate future?

( ) No ( ) Yes If yes, please explain:

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Have you been in a partnership with anyone during the last six years, or have you been an officer in a corporation within the last six years? If yes, give name of business and/or corporation, dates of operation, nature of business/corporation, and your approximate yearly income from the business.

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Have you given away, sold or transferred any valuable item (over \$1,000) in the last year? If yes, please state the nature of the sale or transfer, what was transferred, for how much, and when the transfer occurred.

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What amount of income have you received from other sources in the last two years?

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Will you be eligible for a tax refund this year? ( ) No ( ) Yes If yes, how much?

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## V. ASSETS

Please list all banks with which you have an account, and indicate whether checking or savings, and the approximate balance.

\_\_\_\_\_ Amount: \$\_\_\_\_\_ ( ) Checking ( ) Savings In your name alone? \_\_\_\_\_

\_\_\_\_\_ Amount: \$\_\_\_\_\_ ( ) Checking ( ) Savings In your name alone? \_\_\_\_\_

Have you had a safe deposit box in the last two years? Yes ( ) No ( )

If yes, please give location and the contents of the safe deposit box

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Are you holding valuable property that belongs to another person? ( ) No ( ) Yes

If yes, please describe \_\_\_\_\_

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**VI. MISCELLANEOUS**

Have you had a prior bankruptcy? ( ) No ( ) Yes

If yes, list the case # \_\_\_\_\_, date filed \_\_\_\_\_,

and the outcome ( ) Dismissed ( ) Discharged successfully

Is any of your property in the hands of a receiver, trustee, or other liquidating agent?

( ) No ( ) Yes If yes, please describe \_\_\_\_\_

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Are you suing anyone right now?

( ) No ( ) Yes If yes, please describe \_\_\_\_\_

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Have you been involved in a workers' compensation or personal injury lawsuit from which you expect to recover money?

( ) No ( ) Yes If yes, please describe \_\_\_\_\_

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Have you had any repossessions in your past history?

( ) No ( ) Yes If yes, please describe \_\_\_\_\_

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Have you suffered any losses by fire, theft, or gambling during the last year?

( ) No ( ) Yes If yes, please describe \_\_\_\_\_

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Please list the years in which your debt was incurred: \_\_\_\_\_