

Strouse Law Offices

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General Instructions Regarding This Form

Need for information. Through the filing of bankruptcy process, we are required as your legal representatives to submit thorough information relating to your financial situation. In order for us to have proper and adequate information, we have created this form. It is a bit lengthy but greatly helps us through the process when thorough data is submitted through it. It is unlikely that you will not have all of the information when filling out this form so we encourage you to contact any sources who may be able to help you provide as much information as requested within this form. Incomplete information can hurt your case. Please note that we cannot do anything on your behalf without this form. Even if some of the items seem trivial, they may be important in the eyes of others. Please call us at 414-963-9563 (Milwaukee), 262-631-5886 (Racine) or 262-577-2215 (Kenosha) with any questions.

The Law Requires a Full and Complete Disclosure.

The law states that if a person deliberately or negligently fails to disclose any asset with a fair market value of \$500.00 or more, the court can impose penalties. It also states that if an asset with a fair market value of \$500.00 or more was transferred for inadequate consideration, wasted, or given away within a year of or during the course of action or is otherwise unaccounted for, the asset is subject to financial disclosure. Lastly, failure to disclose an asset can also hurt your credibility in the eyes of the court.

Fair Market Value is Your Best Estimate of What an Item Could Sell for At the Present.

Estimated value requests within this form refer to what you think something could realistically sell for at the present time, not its purchase or replacement prices. Use your best guess. Some of the items you will need to give a Fair Market Value on are household items like furniture, appliances, furnishings and other similar classes of property. Make sure to not have sentimental values factor in to your equations.

PLEASE PROVIDE US WITH COPIES OF YOUR RECORDS AND NOT ORIGINALS.

LIST OF IMPORTANT DOCUMENTS

1. TAX RETURNS. Please furnish copies of your state and federal income tax returns for the last two years including all schedules, 1099's and W2s. The trustee in your case is going to require these records and will keep a copy.

2. COPIES OF YOUR TWO MOST RECENT PAYCHECK STUBS. These items are needed in order to accurately calculate and report your current income. Please be aware we need the full paycheck stub not just a copy of the check.

3. COPIES OF ALL TITLES TO ANY VEHICLES. This includes cars, trucks, motorcycles, boats, snowmobiles. It does not matter if you have a loan on any of these vehicles.

4. COPIES OF PROPERTY TAX BILLS FOR ANY PROPERTIES OF WHICH YOU ARE PART OR WHOLE OWNER. Please furnish a copy of any of the most recent property tax bills showing fair market values.

6. COPY OF YOUR RECORDED DEED(S).

7. COPY OF YOUR RECORDED MORTGAGE(S).

5. COPY OF YOUR MOST RECENT RETIREMENT/PENSION STATEMENTS.

We cannot prepare or file your petition without these documents. It is your responsibility to furnish these items upon completion of this worksheet.

MASTER INFORMATION LIST

YOU

SPOUSE

Full Name: _____

Full Name: _____

Address: _____

Address: _____

Street: _____

Street: _____

City: _____

City: _____

State, Zip: _____

State Zip: _____

County: _____

County: _____

Phone (Home): _____

Phone (Home): _____

Phone (Work): _____

Phone (Work): _____

Fax: _____

Fax: _____

Social Security Number: _____

Social Security Number: _____

Current Occupation: _____

Current Occupation: _____

Employer's Name: _____

Employer's Name: _____

Are you currently a member of the US
Armed Forces? _____

Are you currently a member of the US
Armed Forces? _____

Branch: _____

Branch: _____

Dates of Service: _____

Dates of Service: _____

Referred by: _____

List any prior bankruptcies including district filed, case number, year of filing and chapter: _____

List any pending bankruptcies of a family member including district to be filed, full name and relationship:

YOUR ASSETS
CASH AND DEPOSIT ACCOUNTS

Do you or your spouse have any bank accounts? Yes No

If yes , please furnish the following. Be sure to include all checking, savings and credit union accounts.

Type of Account: Checking Savings

Name of Institution: _____

Current Balance: _____

Type of Account: Checking Savings

Name of Institution: _____

Current Balance: _____

Type of Account: Checking Savings

Name of Institution: _____

Current Balance: _____

Type of Account: Checking Savings

Name of Institution: _____

Current Balance: _____

In general how much cash do you keep on hand? _____

SECURITY DEPOSITS

Do you or your spouse have any security deposits? Yes No

If yes please state how much: _____

SECURITIES, STOCKS, BONDS, AND MUTUAL FUND ACCOUNTS

Do either you or your spouse own any stocks, bonds, commodities, mutual funds or other securities? Yes No

If yes please provide the following:

Name of Brokerage Firm

Account Number

STOCKS

No. of Shares

Name of Company

Current Value

BONDS

Name of Issuer

Current Value

US SAVINGS BONDS

Series	Face Value	Date of Maturity
_____	_____	_____
_____	_____	_____
_____	_____	_____

MUTUAL FUNDS AND COMMODITY ACCOUNTS

Name of Institution	No. of Shares	Current Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

LIFE INSURANCE

Do either you or your spouse own any life insurance or are you aware of the existence of any life insurance on either of your lives that has cash value? Yes No

If yes please provide the following:

Name of Company	Name of Insured	Face Value	Cash Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Are you aware of any loans against any of the above policies? Yes No

If yes please furnish details concerning original amount of loan, balance on loan and purpose of loan: _____

PROFIT SHARING, PENSION PLANS, AND RETIREMENT ACCOUNTS

Do either you or your spouse have any interest in any profit sharing plan, pension plan, employment stock option plan, employee stock purchase plan, deferred income, 401 (K) plan?
[] Yes [] No

If yes, please furnish the following:

Type of Account	Name of Account	Current Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

IRA AND ANNUITY PLANS

Do either you or your spouse have any interest in any IRA plans or Annuity Plans? [] Yes [] No

If yes, please furnish the following:

Name of Institution	Type of Account	Current Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

TAX REFUNDS AND OTHER LIQUIDATED DEBTS OWED DEBTOR

Are either you or your spouse expecting any income (not yet received) from either tax refunds or court awards? [] Yes [] No

If yes, please furnish the following

Source of expected income	Amount of expected income
_____	_____
_____	_____
_____	_____

INTEREST IN LIFE ESTATES

Do either you or your spouse have any interest in any life estates? Yes No

If yes, please furnish the following:

From whom:	Amount	Relationship	Estate in trust(yes/no)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

FAMILY SUPPORT

Are you or your spouse eligible to receive any family support such as child support, alimony, etc.?
 Yes No

If yes please provide the following:

From Whom:	Amount	Rate of receipt (Monthly, Weekly, etc.)
_____	_____	_____
_____	_____	_____
_____	_____	_____

OTHER INCOME

Please use the rest of this page to provide information on any other income excluding that of employment of benefit programs such as social security.

AUTOMOBILES, MOTORCYCLES, ETC.

Do either you or your spouse own or lease any vehicles? Yes No

If yes, list the detailed information requested for each vehicle. If there is a lien upon any vehicle, indicate the lien amount and the creditor's name. If you or your spouse have the use of any car leased, please describe.

Year _____ Make _____ Model _____

Design (2 Door, 4 Door, etc) _____

Optional Equipment (air conditioning, power equipment, stereo, other) _____

Approximate Mileage: _____

Condition: Excellent, Good, Fair, Poor

Creditor _____

Creditor Address _____

Account Number _____

Account Balance _____

Year _____ Make _____ Model _____

Design (2 Door, 4 Door, etc) _____

Optional Equipment (air conditioning, power equipment, stereo, other) _____

Approximate Mileage: _____

Condition: Excellent, Good, Fair, Poor

Creditor _____

Creditor Address _____

Account Number _____

Account Balance _____

BOATS

Do either you or your spouse own any boats? Yes No

If yes, please list the detailed information for each boat. If there is a lien upon any boat, indicate the lien amount and the creditor's name.

Year _____ Make _____ Model _____

Length _____

Creditor _____

Creditor Address _____

Account Number _____

Account Balance _____

Year _____ Make _____ Model _____

Length _____

Creditor _____

Creditor Address _____

Account Number _____

Account Balance _____

AIRPLANES

Do either you or your spouse own any airplanes? Yes No

If yes, list the detailed information requested for each airplane. If there is a lien upon any airplane, indicate the lien amount and the creditor's name.

Year _____ Make _____ Model _____

Approximate Air Miles _____

Creditor's Name _____

Creditor's Address _____

Account Number _____

Account Balance _____

FARMING

Do either you or your spouse own a farm? Yes No

If yes, please list the following information:

Farming Supplies	Value	Farming Equipment	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Farming Machinery	Value	Crops	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

ANIMALS

Do either you or your spouse own any livestock and/or pedigreed animals? Yes No

If yes, please list the following information:

Breed	Number	Value
_____	_____	_____
_____	_____	_____

YOUR DEBTS - SECURED

Please list information regarding any secured debts you may have. Please note that in lieu of this section, submitting your most recent statements will suffice.

Creditor Name and Address	Account No.	Mortgage/ Lien - Auto, Furniture, etc	Date of Debt
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TAXES

Do either you or your spouse owe any taxes? [] Yes [] No

If yes, please provide the following:

Government To Whom Taxes are Due	Year	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

YOUR DEBTS - UNSECURED

Please list information regarding any unsecured debts you may have. Please note that in lieu of this section, submitting your most recent statements will suffice.

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

YOUR DEBTS – UNSECURED (Cont.)

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

Creditor Name: _____

Creditor Address: _____

Account Number _____ Balance _____ Date of Debt _____

Should you need more room, please feel free to continue on the back of this page.

MARITAL STATUS AGE AND EMPLOYMENT INFORMATION

Please check one of the following: Single Married Divorced Separated

If married, are you presently living with your spouse? Yes No

If no, date separated _____

Have either of you started an action for divorce, legal separation, annulment, or support against the other? Yes No. If so, state the following

Year started: _____

In what court (state and county) _____ Case No. _____

Date of dismissal or decree _____

If divorce proceedings were completed within the last year, please provide a copy of the decree.

Do you or your spouse intend to file for divorce within the next six months? Yes No

If yes, do you anticipate the other party to oppose the petition for divorce? Yes No

Please provide the following information regarding your age and employment information

YOU

YOUR SPOUSE

Age _____

Age _____

Occupation _____

Occupation _____

Employer _____

Employer _____

Length of Employment _____

Length of employment _____

Address of Employer

Address of Employer

WRITTEN AGREEMENTS & CONTRACTS

Have either you or your spouse entered into any written agreements or contracts for example housing leases or automobile leases? Yes No

If yes, please list the name of the parties involved in any agreements, contracts or leases and their addresses: _____

Please use the rest of this page to describe any other debts owed not covered in the previous pages.

CHILDREN OR OTHER DEPENDENTS

Child/Dependent Name	Age	Relationship
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other than children, do you have any dependents? Yes No

If yes, please explain _____

**THE NEXT SECTION IS FOR THOSE WHO EITHER HAVE
SUBSTANTIAL BUSINESS INTERESTS OR ARE
SELF-EMPLOYED**

**IF YOU ARE NOT SELF-EMPLOYED AND DO NOT HAVE
SUBSTANTIAL BUSINESS INTERESTS, YOU ARE FINISHED
WITH THIS WORKSHEET. THANK YOU FOR YOUR TIME
AND EFFORT.**

HOUSEHOLD GOODS

Item	Qty. Owned	Est. Fair Market Value	Balance Owed
Beds	_____	_____	_____
CD Player	_____	_____	_____
Desks	_____	_____	_____
Dining Table	_____	_____	_____
End Table	_____	_____	_____
Kitchen Table	_____	_____	_____
Kitchen Chairs	_____	_____	_____
Lamps	_____	_____	_____
Living Room Chairs	_____	_____	_____
Loveseat	_____	_____	_____
Microwave	_____	_____	_____
Paintings	_____	_____	_____
Piano	_____	_____	_____
Printer	_____	_____	_____
Radio	_____	_____	_____
Speakers	_____	_____	_____
Stove	_____	_____	_____
Refrigerator	_____	_____	_____
Sofa	_____	_____	_____
Freezer	_____	_____	_____
Washer	_____	_____	_____
Coffee Table	_____	_____	_____
Vacuum	_____	_____	_____
Entertainment Center	_____	_____	_____

Item	Qty. Owned	Est. Fair Market Value	Balance Owed
Bookcase	_____	_____	_____
Curio Cabinet	_____	_____	_____
Dishwasher	_____	_____	_____
Grill	_____	_____	_____
Patio Furn.	_____	_____	_____
Snowblower	_____	_____	_____
Lawnmower	_____	_____	_____
Dishes	_____	_____	_____
Dressers	_____	_____	_____
Night Stands	_____	_____	_____
Armoire	_____	_____	_____
Rugs	_____	_____	_____
TV	_____	_____	_____
VCR	_____	_____	_____
Washer	_____	_____	_____
Pots/Pans	_____	_____	_____
China	_____	_____	_____
Flatware	_____	_____	_____
Silverware	_____	_____	_____
DVD Player	_____	_____	_____
Computer	_____	_____	_____
		TOTAL _____	TOTAL _____

OTHER PERSONAL GOODS

Please list the fair market value of the following items

- Clothing_____
- Collectibles (Books, Stamp Collections, Coin Collections, etc)_____
- Jewelry_____

Additional Contact Information

Please list the following alternative contact information in case of an emergency.

Do either you or your spouse have an e-mail address? Yes No

If yes, please provide:

In the rare event that we are unable to locate either you or your spouse, please provide the name, address, telephone number and relationship of the closest relative not living with you.

Name: _____

Address: _____

Telephone No.: _____

Relationship: _____