

A Message from the attorneys and staff of the Vida Law Firm:

It is our goal as bankruptcy attorneys to help reduce your stress in working through the decision to file bankruptcy and the bankruptcy process. Choosing the right attorney for yourself is very important to your bankruptcy case. Clients generally have anxiety about providing all of their personal information to any attorney not knowing why that information is relevant or what the attorney will do with it. We assure you that the attorneys in this firm and our staff are sensitive to your need to understand what is happening with your case. Having accurate and detailed information from a client is one of the most important issues in a bankruptcy. Your success in bankruptcy depends upon your involvement.

GENERAL QUESTIONS

Circle Y or N. On this page, the term “you,” refers to and includes both you and your spouse.

1. **Y - N** Have you lived anywhere other than Texas in the last two years (730 days)? **If yes**, where and when: _____
2. **Y - N** Do you have any dependants living at home? **If yes**, list their ages, and relationship to you _____
3. **Y - N** Are you behind on child support or alimony? **If yes**, how much do you owe? _____
How much are your monthly court ordered child support or alimony payments? _____
4. **Y - N** Have you ever filed bankruptcy? **If yes**, when and what chapter? _____
Did you receive a discharge or was your case dismissed? _____
5. **Y - N** Have you transferred property to anyone in the past two years? (“Transfer” means to sell, give, or trade any real property (i.e., land, home, etc.) or personal property (i.e., vehicle, furniture, gun, etc.) to any person) _____
If yes, what property? _____ To whom? _____
6. **Y - N** Is there anyone you could sue for money damages? **If yes**, who? _____
Why? _____
7. **Y - N** Do you have an injury claim, auto accident claim, class action claim, medical malpractice claim, etc.? **If yes**, against whom? _____ Why? _____
8. **Y - N** Are you currently the beneficiary of a trust? **If yes**, explain _____
9. **Y - N** Are you an heir or beneficiary under any person’s will? **If yes**, is it in probate? _____
10. **Y - N** Are both of your parents living? If no, did the deceased parent(s) have a will? _____
If yes, is there anything in the estate of the deceased parent(s) that has not been distributed _____
11. **Y - N** Do you owe any debt to any family members or friends? _____
If yes, to whom? _____ How much? _____ Date of debt? _____
12. **Y - N** Have you made any payments to any family members or friends within one year of today? **If yes**, to whom? _____ How much? _____ Date(s) of payment (s)? _____
13. **Y - N** Within the past 90 days have you charged \$500.00 or more on a single credit card? _____
14. **Y - N** Within the past 90 days have you taken cash advances or written convenience checks totaling more than \$750? _____
If yes, how much? \$ _____, Why? _____
15. **Y - N** Do you own, or have an interest in ANYTHING, other than your home, the content of your home, your vehicles, tools of your trade, and your retirement accounts? _____
If yes, what and how much is it worth? _____
16. **Y - N** **Is First National Bank of Burleson one of your creditors?** _____

EMPLOYMENT INFORMATION

Please note: We request that you bring a copy of your last year’s income tax return and a copy of your two most recent pay stubs along with this client information sheet. If you are self-employed, please provide a year-to-date Profit and Loss Statement for your business.

Your Current Occupation How Long Your Employer's Name Ful time or Part-time (circle one)

Spouse's Current Occupation How Long Spouse's Employer's Name Full time or Part-time (circle one)

Your SS# _____ Spouse’s SS# _____

INCOME INFORMATION FOR YOU AND/or YOUR SPOUSE

Your Gross Income (before deductions): _____ When do you get paid? Please circle answer:
Monthly Every other Week Twice a Month Weekly

Spouse’s Gross Income (before deductions): _____ When do you get paid? Please circle answer
Monthly Every other Week Twice a Month Weekly

Do you or your spouse get overtime or bonuses? Yes ___ No ___ Amount \$ _____
Explain: _____

Do you or your spouse receive Social Security Benefits Yes ___ No ___ Amount \$ _____
Explain: _____

Do you or your spouse receive a Retirement or Pension Yes ___ No ___ Amount \$ _____
Explain: _____

Do you or your spouse pay or receive Child Support? Yes ___ No ___ Amount \$ _____
Explain: _____

Do you or your spouse receive any Rental Income? Yes ___ No ___ Amount \$ _____
Explain: _____

Do you or your spouse have any other income (VA, Royalties, Trust)? Yes ___ No ___
Explain: _____ Amount \$ _____

QUESTIONS REGARDING YOUR DEBTS

YOUR HOME/PROPERTY INFORMATION

IS YOUR HOME POSTED FOR FORECLOSURE? Y N If so, when _____

Home Mortgage Company Name (1st lien): _____

What's the value of your Home? _____

What are Monthly Payment? _____ Are you behind? _____ If yes, how many months? _____

Do you want to keep your home? _____ How much is the pay-off? _____

Are taxes and insurance included in your home payment? _____

Is your home a manufactured home? _____ If yes, do rent or own the land? _____

If you own the land, are you buying it under a mortgage, a contract for deed, or other? _____

Home Mortgage Company Name (2nd lien): _____

What are Monthly Payment? _____ Are you behind? _____ If yes, how many months? _____

How much is the pay off? _____

Do you own any rental property? Y N Lien Holder _____ Monthly Payments: _____

Are you behind? _____ If yes, how many months? _____ ANY FORECLOSURE ISSUES Y N

YOUR VEHICLE INFORMATION

ARE ANY OF YOU VEHICLES IN DANGER OF BEING REPOSSESSED Y N

1st Vehicle: Creditor Name: _____ Year: _____ Make: _____ Model: _____

Miles: _____ Pay off: _____ Interest Rate: _____ Monthly Payment: _____ Purchase Date: _____

of payments by contract? _____ Are you behind? _____ If yes, how many months? _____ Do you want to keep car/truck? Y /N

2nd Vehicle: Creditor Name: _____ Year: _____ Make: _____ Model: _____

Miles: _____ Pay off: _____ Interest Rate: _____ Monthly Payment: _____ Purchase Date: _____

of payments by contract? _____ Are you behind? _____ If yes, how many months? _____ Do you want to keep car/truck? Y /N

Do you have more than 2 vehicles? If so, please provide information _____

Do you own any other vehicles that are paid for? Y - N If yes, provide: _____

Year: _____ Make: _____ Model: _____ Fair market value: _____

OTHER CREDITOR INFOMATION

Do you have any creditors whose claims are secured by a collateral such as recreational vehicle, furniture, appliances,

above ground pool, stocks, bonds, etc.? Y - N If yes, for each creditor provide:

Creditor: _____ Collateral: _____ Total Debt: _____ Monthly Payment: _____ Interest: _____ Want to Keep? _____

Creditor: _____ Collateral: _____ Total Debt: _____ Monthly Payment: _____ Interest: _____ Want to Keep? _____

Taxes owed: (circle where appropriate)

Creditor	Type of tax	Year/Quarter	Amount Due	Lien filed
IRS	1040, 940, 941, other	_____	\$ _____	Yes - No
IRS	1040, 940, 941, other	_____	\$ _____	Yes - No
IRS	1040, 940, 941, other	_____	\$ _____	Yes - No
State	sales, other	_____	\$ _____	Yes - No
County/City/ISD	real, personal, other	_____	\$ _____	Yes - No

Have you filed all income tax returns that are due? _____ If no, what years have you not filed? _____

Estimated total of all other debts: Personal loans from Friends & Family:\$ _____ Student Loans:\$ _____

Credit cards: \$ _____ Judgments: \$ _____ Medical bills: \$ _____ Signature loans: \$ _____

ANY other debts or claims against you not listed above? Please list the amount and explain the debt/claim. _____
