



ALBERS LAW OFFICE  
— LLC —  
Tracy L. Albers, Attorney at Law

**PLEASE BRING THE FOLLOWING DOCUMENTS TO YOUR  
INITIAL CONSULTATION**

1. Your most recent four paystubs for both you and your spouse (if applicable). Even if your spouse is not going to be filing, you will need to bring his/her four most recent paystubs also.
2. Any lawsuits that you have been named a party in (plaintiff or defendant). This includes a foreclosure, wage garnishment, traffic tickets, judgments from debt collection, etc.
3. Your last two years of tax returns.
4. A fully completed Bankruptcy Intake Sheet.
5. The completed list of debts. You do not need to provide exact balances or account numbers for the initial consultation, but please try to be as accurate as possible. If you are unsure of what your debts are, I suggest you obtain a copy of your 3-in-1 credit report from [www.annualcreditreport.com](http://www.annualcreditreport.com). You are entitled to one free credit report per year.

Thank you in advance for taking the time to complete the information as completely as you can. I realize this paperwork can seem overwhelming, but it will give me the information I need to provide accurate legal advice to you. PLEASE NOTE: If you fail to complete the Bankruptcy Intake Sheet and List of Creditors, this could possibly result in a rescheduling of your initial consultation. If you need to cancel or reschedule your appointment, please give at least a 24-hour notice so that I may give your appointment time to another client.

I look forward to meeting with you!

*Tracy L. Albers*

# BANKRUPTCY INTAKE SHEET

Please fill out ALL the information requested in these forms. If a question or section DOES NOT apply to you, write "N/A" in the space. The more information you provide in these forms, the faster your bankruptcy petition can be prepared. There will be a delay if we need to obtain more information concerning a specific asset, debt or creditor; so please provide as much detail as you can and fill in all the information requested in these forms. Thank you for taking the time to be thorough and complete.

First Name	Full Middle Name	Last Name
Social Security #	Date of Birth	Age
Current Address		
County of Residence	Length of Time at Address	Email Address
Home Phone #	Cell Phone #	Work Phone #
Place of Employment	Employer Address	
Job Title	Length of Time Employed Here	Prior Last Name/s
Have you ever been divorced?	If yes, when?	Where? (County & State)

MAILING ADDRESS- If you would like any correspondence by the bankruptcy court to be sent to a different address than the physical address you provided above (ie P.O. Box), please provide the address below:

## INFORMATION ABOUT YOUR SPOUSE

First Name	Full Middle Name	Last Name
Social Security #	Date of Birth	Age
Current Address (if living separately)		
Home Phone #	Cell Phone #	Work Phone #
Place of employment	Employer Address	
Job Title	Length of Time Employed Here	Prior Last Name/s
Have you ever been divorced?	If yes, when?	Where? (County & State)

Have you resided in the same county for at least 180 days  Yes  No  
 If not, please list your previous address \_\_\_\_\_

Are you filing this bankruptcy with your spouse?  Yes  No  Not Sure

Have you filed bankruptcy in the last 8 years?  Yes  No

If "yes" when and where? \_\_\_\_\_

**DEPENDENTS**

Name	Age	Relationship to You	Is this person/child living with you?
1.			
2.			
3.			
4.			
5.			

**YOUR INCOME**

What is your Year-to-Date total GROSS (before taxes) income? \_\_\_\_\_

What was your GROSS income last year (from all W-2s)? \_\_\_\_\_

How often do you get paid?  Weekly  Bi-weekly  Once a month  Semi-monthly (ie 15<sup>th</sup> & 30<sup>th</sup> each month)

How much taxes gets deducted from each paycheck? \_\_\_\_\_

How much is deducted each paycheck for health insurance? \_\_\_\_\_

How much do you pay in union dues? \_\_\_\_\_ How much is deducted for life insurance? \_\_\_\_\_

Are you court ordered to pay alimony or child support?  Yes  No If "yes" how much per check? \_\_\_\_\_

How much is deducted from each paycheck for your 401k? \_\_\_\_\_

Are there any other deductions?  Yes  No

If "yes," how much from each paycheck? \_\_\_\_\_ What is the deduction for? \_\_\_\_\_

Monthly income from real property (rentals) \_\_\_\_\_ Monthly Social Security \_\_\_\_\_

Monthly government assistance \_\_\_\_\_ Monthly food stamps \_\_\_\_\_

Monthly pension or retirement \_\_\_\_\_

Do you have a 2<sup>nd</sup> job?  Yes  No If yes, name of employer \_\_\_\_\_

Address \_\_\_\_\_

Phone number \_\_\_\_\_ Length of time at this job \_\_\_\_\_

Job title \_\_\_\_\_

How often do you get paid?  Weekly  Bi-weekly  Once a month  Semi-monthly (ie 15<sup>th</sup> & 30<sup>th</sup> each month)

What is your average GROSS wages each month? \_\_\_\_\_

Are you self-employed (including home-based business)?  Yes  No

## YOUR SPOUSE'S INCOME

What is your Year-to-Date total GROSS (before taxes) income? \_\_\_\_\_

What was your GROSS income last year (from all W-2s)? \_\_\_\_\_

How often do you get paid?  Weekly  Bi-weekly  Once a month  Semi-monthly (ie 15<sup>th</sup> & 30<sup>th</sup> each month)

How much taxes gets deducted from each paycheck? \_\_\_\_\_

How much is deducted each paycheck for health insurance? \_\_\_\_\_

How much do you pay in union dues? \_\_\_\_\_ How much is deducted for life insurance? \_\_\_\_\_

Are you court ordered to pay alimony or child support?  Yes  No If "yes" how much per check? \_\_\_\_\_

How much is deducted from each paycheck for your 401k? \_\_\_\_\_

Are there any other deductions?  Yes  No

If "yes," how much from each paycheck? \_\_\_\_\_ What is the deduction for? \_\_\_\_\_

Monthly income from real property (rentals) \_\_\_\_\_ Monthly Social Security \_\_\_\_\_

Monthly government assistance \_\_\_\_\_ Monthly food stamps \_\_\_\_\_

Monthly pension or retirement \_\_\_\_\_

Do you have a 2<sup>nd</sup> job?  Yes  No If yes, name of employer \_\_\_\_\_

Address \_\_\_\_\_

Phone number \_\_\_\_\_ Length of time at this job \_\_\_\_\_

Job title \_\_\_\_\_

How often do you get paid?  Weekly  Bi-weekly  Once a month  Semi-monthly (ie 15<sup>th</sup> & 30<sup>th</sup> each month)

What is your average GROSS wages each month? \_\_\_\_\_

Are you self-employed (including home-based business)?  Yes  No

## YOUR REAL ESTATE

NOTICE: IF YOU OWN A MOBILE HOME, PLEASE FILL OUT THE NEXT PAGE. IF YOU OWN MORE THAN 1 PIECE OF REAL ESTATE, PRINT OUT SEPARATE PAGES FOR EACH PIECE.

Check the type of real estate you own:  House  Condo  Vacant lot  Other

Intention:  Keep  Surrender  Currently for sale  Not sure

Name(s) on the deed: \_\_\_\_\_

Address of real estate: \_\_\_\_\_

Name of mortgage company: \_\_\_\_\_

Monthly payment \_\_\_\_\_ What is the payoff amount of this mortgage? \_\_\_\_\_

Are you behind on payments?  Yes  No If yes, how many months? \_\_\_\_\_

Is there a 2<sup>nd</sup> mortgage on this property?  Yes  No If yes, name of mortgage co. \_\_\_\_\_

Monthly payment \_\_\_\_\_ What is the payoff amount of the 2<sup>nd</sup> mortgage? \_\_\_\_\_

Are you behind on payments?  Yes  No If yes, how many months? \_\_\_\_\_

IF THERE IS A THIRD MORTGAGE, PLEASE ATTACH A SEPARATE SHEET OF PAPER WITH THIS INFORMATION.

## YOUR MOBILE HOME

PRINT OUT ADDITIONAL PAGES FOR EACH MOBILE HOME YOU OWN.

Name(s) on title \_\_\_\_\_

Address \_\_\_\_\_

Intention:  Keep  Surrender  Currently for sale  Not sure

Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

Are the wheels removed from the mobile home and is the mobile home attached to the ground?  Yes  No

Does your mobile home sit in a mobile home park?  Yes  No If yes, list the monthly lot rent \_\_\_\_\_

Does your mobile home sit on a piece of land you own?  Yes  No Acreage \_\_\_\_\_

Do you make payments on the land that it sits on?  Yes  No If yes, what is the payment? \_\_\_\_\_

Name of mortgage company \_\_\_\_\_

Monthly payment \_\_\_\_\_ What is the payoff amount of this mortgage? \_\_\_\_\_

Are you behind on payments?  Yes  No If yes, by how many months? \_\_\_\_\_

## YOUR MOTOR VEHICLES

Motor vehicles include cars, trucks, SUVs motorcycles, boats, trailers, campers etc. that are TITLED in you (or your spouse's name). Print out more sheets if you own more than 4 vehicles.

Type:  Automobile  Truck  Motorcycle  Other

Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  2dr  4dr  Extended cab  Other

Intention:  Keep  Surrender  Currently for sale  Not sure

Name(s) on title \_\_\_\_\_

Is vehicle leased?  Yes  No If yes, what is the "buyout" on the lease? \_\_\_\_\_

Name of company you make payments to for this vehicle \_\_\_\_\_

Monthly payment \_\_\_\_\_ Behind on payments?  Yes  No If yes, by how many months? \_\_\_\_\_

What is the payoff amount on this vehicle? \_\_\_\_\_

Is this vehicle listed as collateral on a personal loan?  Yes  No

If yes, name of loan company for personal loan \_\_\_\_\_

---

Type:  Automobile  Truck  Motorcycle  Other

Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  2dr  4dr  Extended cab  Other

Intention:  Keep  Surrender  Currently for sale  Not sure

Name(s) on title \_\_\_\_\_

Is vehicle leased?  Yes  No If yes, what is the "buyout" on the lease? \_\_\_\_\_

Name of company you make payments to for this vehicle \_\_\_\_\_

Monthly payment \_\_\_\_\_ Behind on payments?  Yes  No If yes, by how many months? \_\_\_\_\_

What is the payoff amount on this vehicle? \_\_\_\_\_

Is this vehicle listed as collateral on a personal loan?  Yes  No

If yes, name of loan company for personal loan \_\_\_\_\_

---

Type:  Automobile       Truck       Motorcycle       Other  
Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  2dr  4dr  Extended cab  Other  
Intention:  Keep  Surrender  Currently for sale  Not sure  
Name(s) on title \_\_\_\_\_  
Is vehicle leased?  Yes  No If yes, what is the "buyout" on the lease? \_\_\_\_\_  
Name of company you make payments to for this vehicle \_\_\_\_\_  
Monthly payment \_\_\_\_\_ Behind on payments?  Yes  No If yes, by how many months? \_\_\_\_\_  
What is the payoff amount on this vehicle? \_\_\_\_\_  
Is this vehicle listed as collateral on a personal loan?  Yes  No  
If yes, name of loan company for personal loan \_\_\_\_\_

---

Type:  Automobile       Truck       Motorcycle       Other  
Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  2dr  4dr  Extended cab  Other  
Intention:  Keep  Surrender  Currently for sale  Not sure  
Name(s) on title \_\_\_\_\_  
Is vehicle leased?  Yes  No If yes, what is the "buyout" on the lease? \_\_\_\_\_  
Name of company you make payments to for this vehicle \_\_\_\_\_  
Monthly payment \_\_\_\_\_ Behind on payments?  Yes  No If yes, by how many months? \_\_\_\_\_  
What is the payoff amount on this vehicle? \_\_\_\_\_  
Is this vehicle listed as collateral on a personal loan?  Yes  No  
If yes, name of loan company for personal loan \_\_\_\_\_



