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FINANCIAL QUESTIONNAIRE

YOUR NAME:

STREET ADDRESS:

Email Address:

Mobile Number:

Facebook ID:

Social Security Number:

Date of Birth:

YOUR SPOUSE'S NAME:

STREET ADDRESS:

Social Security Number:

Date of Birth:

MONTHLY BUDGET

Are you employed?

If so, what kind of work do you do?

MONTHLY INCOME

What is your monthly income before they take out the taxes?

How much is your monthly income after they take out your taxes?

From January to present date how much money did you earn in gross, before taking out taxes?

Last year, how much money did you declare on your taxes as your gross income?

How about two years ago, how much money did you declare on your taxes as your gross income?

How about 3 years ago, how much money did you declare on your taxes as your gross income?

Do you receive unemployment benefits?

If so, how much money do you get from unemployment benefits per month?

When did your unemployment benefits begin?

When will your unemployment benefits end?

Do you receive social security benefits?

If so, how much do you get per month in social security benefits?

Do you receive any government assistance?

How much do you get per month in government assistance?

What type of government assistance do you get?

MONTHLY EXPENSES

Rent:

Mortgage:

Food:

Gas/Electricity for your home:

Cell Phone:

Cable:

Child Support:

Gas for Automobile:

Tolls and Parking:

Health Insurance (not included in payroll):

Life Insurance:

Automobile Insurance:

Transportation (Bus or Subways):

Recreation:

Medical and Dental Expenses:

Auto Installment Payments:

Other Installment Payments:

Other Monthly Expenses (Specify):

EDUCATIONAL EXPENSES

Do ANY of your children attend college?

If so, and you pay **any** of their college costs, please provide;

Name of College	Name of Child	Tuition Payment	Date of Tuition Payment

ASSETS

REAL ESTATE

Do you own real REAL PROPERTY like a house, condo or coop?

If so,

What is Address of each property?

Describe each Property:

Whose names are listed as owners of the property on the Deed?

What is the Current Market Value of this property?

Which bank has the mortgage?

What is the mortgage loan number?

What is the Balance on the Mortgage?

Is there a second mortgage?

If so,

Which bank has the second mortgage?

What is the second mortgage loan number?

What is the Balance on the second Mortgage?

Do you own a **checking BANK ACCOUNT**?

If so,

What is the name of the Bank?

How much money is currently in this **checking** account?

Are any others persons listed as owners on this **checking** Account?

If so, what is the name and address of this person(s)?

Do you own a **Savings BANK ACCOUNT**?

If so,

What is the name of the Bank?

How much money do you have in this **savings** account?

Are any others persons listed as owners on this **savings** Account?

If so, what is the name and address of this person(s)?

PERSONAL ASSETS

Do you own an Automobile?

If so, what is the name, make and mileage of this vehicle?

Is there a loan on this vehicle?

If so, what is the name of the auto loan lender?

What is the Account Number for this auto loan?

How much money do you still owe on this auto loan?

If you sell the car today, how much would you get for it (current value)?

Do you own a **second Automobile**?

If so, what is the name make and mileage of this second vehicle?

Is there a loan on this second vehicle?

If so, what is the name of the second auto loan lender?

What is the Account Number for this second auto loan?

How much money do you still owe on this second auto loan?

If you sell this car today, how much money would you get for it (current value)?

Do you **lease a vehicle**?

What is the year make and model of the leased vehicle and the mileage of the car?

Who do you lease the car from?

When did the lease Start?

When does the lease end?

OTHER PERSONAL PROPERTY

How much **cash** do you have at hand?

What is the value of all your **clothing** if you were to sell it now?

What is the value of all your **jewelry** if you were to sell it now?

What is the value of all your **furniture** if you were to sell it now?

DO YOU OWE ANY BACK TAXES?

If so, please provide the following:

How much do you owe in federal taxes?

For what tax years do you owe these federal taxes?

Do you owe any State Taxes?

For what state do you owe these taxes?

How much do you owe this state in Taxes?

For what tax years do you owe these state Taxes?

Any Lawsuit brought against you in past 12 months?

If so, please provide a copy of Summons and Complaint.

Do you have any claims or lawsuits against anybody for an accident or malpractice or discrimination or any other reason?

If so, please identify each claim:

PRIOR BANKRUPTCY FILINGS

Have you previously filed for bankruptcy?

If yes, please provide the case number and the name of the bankruptcy court in which you filed your case.

Did you get a discharge on your prior bankruptcy filing?

Has your spouse previously filed for bankruptcy?

If yes, please provide the case number and the name of the bankruptcy court in which your spouse the case.

DOCUMENTS TO PROVIDE

OUR OFFICE FOR THE TRUSTEE ON YOUR CASE:

A copy of your tax returns for the last TWO YEARS.

A copy of paystubs for the period of 60 days prior to the date of anticipated filing

Appraisal of Real Property, if applicable.

Blue Book Value of the vehicle(s), if applicable.

Copies of any lawsuits against you.

Copes of all the statements of ALL YOUR BANK ACCOUNTS, for the last 12 months