

SIMON, FITZGERALD, COOKE, REED & WELCH
Simon Fitzgerald, LLC
www.simonfitzgerald.com

Client(s):	
Attorney:	<input type="checkbox"/> Paul Cooke <input type="checkbox"/> Keith Welch <input type="checkbox"/> Kevin Molloy <input type="checkbox"/> Laban Levy <input type="checkbox"/> Karl Helo <input type="checkbox"/> David Welch
Legal Assistant:	
Bankruptcy Chapter:	<input type="checkbox"/> Ch. 7 <input type="checkbox"/> Ch. 13 <input type="checkbox"/> Undecided

ITEMS NEEDED BEFORE WE CAN PREPARE YOUR BANKRUPTCY

Amount Paid:	\$ _____	Balance Required:	\$ _____
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<u>Items/Documents</u>	<u>Need</u>	<u>Received</u>
1. Driver's License		
2. Social Security Card		
3. Copies of last two (2) years of filed Federal Tax Returns		
4. Copies of last two (2) years of filed State Tax Returns		
5. Completed Bring Back Client Questionnaire (make sure to list all creditors, people you owe).		
6. Last 6 months of pay stubs: From _____ through most recent * For both you and your spouse - even if your spouse is not filing		
7. Proof of any other income received in the past 6 months or estimated to be received in the future: • Part-time Income • Social Security/VA Disability • Child Support • Food Stamps/WIC • Pension or Retirement • Oil/Gas Royalties • Rental Income • Contributions from others		
8. Month by month profit and loss statements for any self-employment income for the past 6 months: From _____ through most recent		
9. 401K Loan documentation showing: Payment/Balance/Payoff Date		
10. Proof of Charitable Contributions/Tithes & Offerings		
11. Any Lawsuit documents (now or in the future)		
12. Any Rent-to-Own or Lease-to-Own contracts		
13. Vehicle Insurance (Declarations Page) and proof of monthly payment for each vehicle		
14. Vehicle Loan/Finance Company Contracts and Documents		
15. Other: _____		

ESTIMATED CHAPTER 13 PLAN PAYMENTS:	Approximately \$ _____ for _____ months
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