

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. 2019 & 2020 Federal Tax Returns		
4. 2019 & 2020 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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