

Attorney Michael J. Tremblay
Bankruptcy Analysis Worksheet

Please complete and fax to 508-449-3969 or email to attorney@tremblay.com or bring to your initial interview.
Your submission of and our receipt of this worksheet does not create an attorney-client relationship.

Name: _____
Street address: _____
City: _____ State: _____ Zip: _____
(H) Phone: _____ (W) Phone: _____ Cell: _____
Email: _____ Are you married: Yes/No
Spouse's Name: _____ Household size: _____

Debts:

Tax debts: IRS: \$ _____ Tax Years: _____
 Mass. DOR: \$ _____ Tax Years: _____

Credit Card Debt (total): \$ _____
Medical Bills: \$ _____
Other bills:
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____

(Remember to list all debts, including alimony, child support, student loans, taxes, loans from family members, etc. We may be able to include them in a repayment plan even if they are not dischargeable).

Assets:

Real estate:
Address: _____ Is this your residence? Yes/No
Year purchased: _____ Purchase Price: \$ _____ *
Present fair market value \$ _____ * you may find this on www.zillow.com
First Mortgage Bank: \$ _____
Monthly Payment: \$ _____ Real estate taxes included? Yes/No
Payoff balance: \$ _____ Homeowner's insurance included? Yes/No
Delinquent amount total: _____

Second Mortgage Bank: _____ Payoff balance: \$ _____
Monthly Payment: \$ _____ Delinquent amount total: _____
All owner's names on deed: _____ Homestead filed? Yes/No
Second parcels of real estate (cottage, cabin, vacation home, time share, etc.)?: Yes/No

If yes, provide the same information as above on the back of this page or on a continuation sheet.

Motor Vehicles:

#1 Year: _____ Make: _____ Model: _____
 Mileage: _____ Condition: _____ Value: _____ *
 Loan bank: _____ Monthly Payment: _____
 Loan Payoff: _____ Delinquent amount: _____

#2 Year: _____ Make: _____ Model: _____
 Mileage: _____ Condition: _____ Value: _____ *
 Loan bank: _____ Monthly Payment: _____
 Loan Payoff: _____ Delinquent amount: _____

* obtain value from www.kbb.com or www.nada.com, use "private party" sale price.

If you have additional automobiles (cars, trucks, campers, motorcycles), provide the same information as above on the back of this page or on a continuation sheet.

Other assets:

Bank Accounts (combined total of checking, savings, cd's, money markets, etc.): \$ _____
 IRA's, 401(k)'s, retirement, pension plans (combined totals): \$ _____
 Cash values of Life Insurance, annuities, etc. (combined totals): \$ _____
 Stocks, bonds, securities, brokerage accounts (combined totals): \$ _____
 Artwork, furs, jewelry, antiques, collectibles, etc. (combined totals): \$ _____
 Other assets of significant value (boats, motors, campers, airplanes, etc.): \$ _____

Income

Your annual income: \$ _____ Spouse's annual income: \$ _____

Other Information

Have you ever filed bankruptcy before? Yes/No If so, on what date Yes/No
 Was it a Ch. 7 or 13? _____

Do any of the following apply to you:

Foreclosure notice? Yes/No
 Recent repossessions? Yes/No
 Lawsuits? Yes/No
 Wage attachments? Yes/No
 Real estate attachments? Yes/No