

Attorney Michael J. Tremblay
Quick 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 Name: _____
 Monthly Payment: \$ _____ Real estate taxes included? Yes/No
 Payoff balance: \$ _____ Homeowner's insurance included? Yes/No
 Delinquent amount total: \$ _____

 Second Mortgage Bank Name: _____ Payoff balance: \$ _____
 Monthly Payment: \$ _____ Delinquent amount total: \$ _____
 All owner's names on deed: _____ Homestead filed? Yes/No
 Other parcels of real estate owned (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, jet ski, etc.): \$ _____

Income

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

Employer: _____ Employer: _____

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