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QUIK-VIEW PERSONAL BANKRUPTCY WORKSHEET

This is a very basic worksheet that allows you and a bankruptcy lawyer to have a meaningful initial consultation. It is important for both you and the lawyer that you provide all information so that the advice given is accurate and meaningful, but if you do not have every detail to the penny you can get it later. If you are proceeding with a Bankruptcy filing and preparing schedules, do not use this, as you need the more detailed and thorough worksheet.

Name(s) _____ E-mail: _____

Home Phone: _____ Mobile: _____ Work: _____

Current Address: _____

How Long at this address: _____ Facing Foreclosure Y/N: _____ (*call ASAP*)

Rent or Own?: _____ Rent/Mortgage Payment: \$ _____ Months Behind: _____

If owned, value of house? _____ Balance Owed on Home?: _____

Household Size (spouse, children): _____ Spouse also filing BR? _____

Current Employment _____ How Long: _____

Periods of Unemployment Last 12 Months? _____

Monthly Income: \$ _____ Spouse Monthly Income (even if not filing): \$ _____

Other Income (side jobs, home business, etc.): _____

Total income from employment for last six months (salary, bonuses, commissions, etc.)? Simply add up every penny of income, 6 months exactly, back from today. You \$ _____ Spouse \$ _____

All other income for last six months (rentals, gifts, retirement, unemployment, social security, etc.).

You \$ _____ Spouse \$ _____. Sources of additional income: _____

** Spouse's income must be included even if he/she is not filing.*

Vehicle 1 Make & Model: _____ Lease or Own: _____ Monthly Pmt: \$ _____

Balance of Loan: \$ _____ Value: \$ _____ (Edmunds.com or NADA.com)

Vehicle 2 Make & Model: _____ Lease or Own: _____ Monthly Pmt: \$ _____

Balance of Loan: \$ _____ Value: \$ _____

Other vehicles, boats, planes owned by you, or jointly with someone else (make, model, value, balance owed on loan): _____

Other real property owned by you or jointly with someone else (location, co-owners, value, balance on loan): _____

Total of all **Unsecured** Debt (credit cards, personal loans, medical bills, judgments, deficiencies after foreclosure or repossession, etc.): \$ _____.

Of this total, how much is tax debt: \$ _____ Student Loans: \$ _____

Personally guaranteed business debt: \$ _____

Any other information you believe may be important, such as pending lawsuits, other debts, valuable assets, divorce, medical issues, elderly relatives living with you, etc.? _____

