

## SHORT FORM QUESTIONNAIRE

### General Information

1. Name:
2. Phone Number:
3. Email:
4. Ever filed bankruptcy before? If so, which chapter of bankruptcy and when?
5. Are you married?
6. Do you have any children living at home?

### Assets

1. Do you own a home? If so, what are the payoff balances on your mortgages?
2. Do you own a car? If so, please list the make, model, year, and miles of the car.
  - a. Is the car financed, how much left do you owe on the car?
3. Have you transferred any assets in the last year?
4. Have you paid back any family or friend \$600 in the last year?
5. Please list any other assets not mentioned

### Current Income

1. How much money do you make per month *before taxes*?
2. How much money do you make per month *after taxes*?
3. How much money does your spouse make per month *before taxes*?
4. How much money does your spouse make per month *after taxes*?

### Current Expenses

Note: If you want to file a Chapter 7, you MUST show that your expenses without including your credit cards *exceed* your income. If you have any money left over at the end of the month to pay your credit cards you will not qualify for a chapter 7 bankruptcy. Think about each expense carefully. You probably do not pay for each item monthly you may only pay for certain expenses a few times a year so convert that total yearly expense to a monthly amount. For example, your dog visits the vet once a year and it costs \$120 - so list that expense as \$10/month.

(Please indicate all expenses per month)

1. Rent or Your Home Mortgage
  - a. Does this include your real estate taxes? If not, how much are your real estate taxes per

month?

b. Does this include your property insurance? If not, how much is your property insurance per month?

2. Electricity and Heating
3. Water and Sewage
4. Home Telephone
5. Cell Phones
6. Internet
7. Cable TV
8. Other Utility Bills
9. Home Maintenance including repairs and general upkeep:
10. Food: (groceries, taking family out to dinner, and school/work lunches)
11. Clothing (this expense often fluctuates but take the average over a year period - you buy shoes, coats, sweaters, socks, etc for the family - convert it into a monthly amount).
12. Laundry and Dry Cleaning
13. Medical and Dental Expenses (that you you pay out of pocket such as co-pays or anything not covered by your insurance)
14. Charitable contributions
15. Insurance not deducted from your paycheck
  - a. Renter's insurance
  - b. Life insurance
  - c. Health insurance
  - d. Auto insurance
  - e. Other insurance
16. Taxes not deducted form your paycheck
17. Installment Payments
  - a. Car Loan 1
  - b. Car Loan 2
18. Alimony, Maintenance, Support Paid to Others?
  - a. Is this court ordered?
19. Payments for support of dependents not living at your home
20. Expenses from operation of a business
21. Education expenses necessary to maintain employment
22. Education for a physically or mentally challenged child
23. Childcare: Babysitting, nursery, day care etc.
24. Health Savings Account
25. Care for elderly, chronically ill, or disable family members
26. Education expenses for your children under 18
27. Recreating expenses for kids activities
28. Hair cuts for your family
29. Tax preparation fee (take yearly fee and divide it by 12 for a monthly fee)

30. Prescription, medication, vitamins, supplements
31. Eye Care: Glasses, contacts, contac solution, yearly exam
32. Prescription medication, vitamis, supplements
33. Toiletries: toothpast, mouth wash, shampoo, soap etc.
34. Cold, Allergy, and sinus medication
35. Office supplies you pay for out of pocket
36. Tolls/EZ Pass
37. Work Expenses
38. Job hunting expenses: postage, resumes, stationary
39. Home landscaping and lawn care
40. Home maintenance: pressure washing, painting
41. Tires - have you recently replaced them or will you need to replace them soon
42. Car sashes, Oil changes
43. Car inspections
44. Pool care
45. Home alarm system fees
46. Parking
47. Work/School Lunches
48. Books for work or school
49. Work/School Uniforms
50. School Fees
51. Before/After School Care
52. College expenses: dorm furnishings, fees, books, laundry
53. Music lessons, dance lessons
54. Sports participation costs: uniforms, fees, equipment
55. Gym, YMCA Fees
56. Other memberships
57. Pet food, vet visits, pet medication, pet grooming/washing (covert yearly expenses to monthly)
58. Clothing alterations
59. Church/Temple tithes
60. Cigarettes
61. Babysitters