



DOCUMENTS/INFORMATION REQUIRED FOR NEXT APPOINTMENT

- ❑ Last two (2) years of both **Federal** and **State** Income Tax returns (Including 1040 form and Schedule C, if self-employed and any and all 1099s and W2s):
_____ & _____
- ❑ Proof of Income
 - Last six (6) months pay stubs (if unavailable, contact your employer for a summary of the 6 months income)
 - If self-employed, a detailed profit and loss statement for the 6 months prior to the appointment.
 - Proof of any other form of income, including, but not limited to: Social Security, Retirement/Pension, Un-employment benefits, child support/alimony, side jobs/cash income.
- ❑ Last 6 months bank statements on ALL bank accounts (Chapter 7 only, unless requested by attorney for Chapter 13)
- ❑ Copy of most recent mortgage statement & Escrow analysis including home equity loans **FOR EACH PROPERTY**
- ❑ Recorded Warranty Deed and Recorded Mortgage, 1st two pages only **FOR EACH PROPERTY**
- ❑ Property Tax Bill showing SEV (State Equalized Value) **FOR EACH PROPERTY**
- ❑ **Most recent copies of all bills/correspondences from any creditors. Including, but not limited to:**
 - Credit card statements, loan statements, medical bills
 - Judgments, garnishments, lawsuit documents
 - Automobile accounts (monthly statement and any letters)
 - Outstanding utility bills and water bills
 - Student loan bills
 - Friend of the Court/Child support Obligations. Information should include case number, name and address of custodial parent, and statement of arrearages
- ❑ Proof of full coverage, valid Homeowners and Auto insurance (Declarations Page) **(Chapter 13 Only)**
- ❑ Foreclosure notice, Correspondences from Attorney (Trott & Trott, Orleans, etc.)
- ❑ Copy all vehicle contracts (i.e., Purchase Agreement or Lease Agreement) and Title(s)
- ❑ Information relating to any prior bankruptcy filing (i.e., case number, copy of filing)
- ❑ Copy of divorce decrees
- ❑ Recent 401(k), IRA, and/or other investment statements