

Chapter 13 Statement

United States Bankruptcy Court for the _____ District of _____

In re: _____ Case No. _____

Debtor's Name _____

(Include all names used within past six years)

Social Security No. _____ Telephone No. _____

[Each question shall be answered or the failure to answer explained. If the answer is "none" or "not applicable" so state. If additional space is needed for the answer to any question, a separate sheet, properly identified and made a part hereof, should be used and attached.]

The term "original petition," used in the following questions, shall mean the original petition filed under 301 of the Code or, if the Chapter 13 case was converted from another chapter of the Code, shall mean the petition by or against you which originated the first case.

This form must be completed in full whether a single or a joint petition is filed. When information is requested for "each" or "either spouse filing a petition" it should be supplied for both when a joint petition is filed. For a single petition, supply information relating only to the debtor filing the petition.]

1. Name and residence.**a.** Give full name.

Husband (or if single, Debtor) _____

Wife _____

b. Where does debtor, if single, or each spouse filing a petition now reside?

(1) Mailing address of husband [or Debtor] _____

(2) Mailing address of wife _____

(3) Telephone number including area code: Husband [or, if single, Debtor] _____

Wife _____

c. What does debtor, if single, or each spouse filing a petition consider his or her residence, if different from that listed in b, above?

Husband [or Debtor] _____

Wife _____

2. Occupation and income.

- a.** Give present occupation of debtor, if single, or each spouse filing a petition. (If more than one, list all for debtor or each spouse filing a petition.)

Husband (or Debtor) _____
 Wife _____

- b.** What is the name, address, and telephone number of present employer (or employers) of debtor, if single, or each spouse filing a petition? (Include also any identifying badge or card number with employer.)

Husband (or Debtor) _____

 Wife _____

- c.** How long has debtor, if single, or each spouse filing a petition been employed by present employer?

Husband (or Debtor) _____
 Wife _____

- d.** If debtor or either spouse filing a petition has not been employed by present employer for a period of one year, state the name of prior employer(s) and nature of employment during that period.

Husband (or Debtor) _____

 Wife _____

- e.** Has debtor or either spouse filing a petition operated a business, in partnership or otherwise, during the past three years? (If so, give the particulars, including names, dates, and places.)

Husband (or Debtor) _____

 Wife _____

- f.** Answer the following questions for debtor, if single, or each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed:

(1) What are your gross wages, salary, or commissions per pay period?

	Husband (or Debtor)	Wife
(a) Weekly	_____	_____
(b) Semi-monthly	_____	_____
(c) Monthly	_____	_____
(d) Other (specify)	_____	_____

(2) What are your payroll deductions per pay period for:

(a) Payroll taxes (including social security)	_____	_____
(b) Insurance	_____	_____
(c) Credit union	_____	_____
(d) Union dues	_____	_____
(e) Other (specify)	_____	_____

(3) What is your take-home pay per pay period? _____

(4) What was the amount of your gross income for the last calendar year? _____

(5) Is your employment subject to seasonal or other change? _____

(6) Has either of you made any wage assignments or allotments? [If so, indicate which spouse's wages were assigned or allotted, the name and address of the person to whom assigned or allotted, and the amount owing, if any, to such person. If allotment or assignment is to a creditor, the claim should also be listed in Item 11a.]

3. Dependents. (To be answered by debtor if unmarried, otherwise for each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed.)

a. Does either of you pay (or receive) alimony, maintenance, or support? (Yes or no) _____.

If so, how much per month? _____ For whose support? (Give name, age, and relationship to you.)

Husband (or Debtor) _____

Wife _____

b. List all other dependents, other than present spouse, not listed in (a) above. (Give name, age and relationship to you.)

Husband (or Debtor) _____

Wife _____

4. Budget.

a. Give your estimated average future monthly income, if unmarried, otherwise for each spouse whether single or joint petition is filed, unless spouses are separated and a single petition is filed.

(1) Husband's [or Debtor's] monthly take-home pay	_____
(2) Wife's monthly take-home pay	_____
(3) Other monthly income [specify]	_____
Total	_____

b. Give estimated average future monthly expenses of family (not including debts to be paid under plan), consisting of:

(1) Rent or home mortgage payment (include lot rental for trailer)	_____
(2) Utilities:	
Electricity	_____
Heat	_____
Water	_____
Telephone	_____

Total Utilities _____

(3) Food	_____
(4) Clothing	_____
(5) Laundry and cleaning	_____
(6) Newspapers, periodicals, and books (including school books)	_____
(7) Medical and drug expenses	_____
(8) Insurance (not deducted from wages)	
(a) Auto	_____
(b) Other	_____
(9) Transportation (not including auto payments to be paid under plan)	_____
(10) Recreation	_____
(11) Dues, union, professional, social or otherwise (not deducted from wages)	_____
(12) Taxes (not deducted from wages)	_____
(13) Alimony, maintenance, or support payments	_____
(14) Other payments for support of dependents not living at home	_____
(15) Religious and other charitable contributions	_____
(16) Other (specify) _____	_____

Total _____

c. Excess of estimated future monthly income over estimated future expenses
(Total from Item 4a above minus total from Item 4b above.) _____

d. Total amount to be paid each month under plan _____

5. Payment of attorney.

- a.** How much have you agreed to pay or what property have you agreed to transfer to your attorney in connection with this case?
 - b.** How much have you paid or what have you transferred to the attorney?
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6. Tax refunds. [To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed, unless spouses are separated and a single petition is filed.]

To what tax refunds (income or other), if any, is either of you, or may either of you, be entitled? [Give particulars, including information as to any refunds payable jointly to you or any other person. All such refunds should also be listed in Item 13b.]

7. Financial accounts, certificates of deposit, and safe deposit boxes. [To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed.]

- a.** Does either of you currently have any accounts or certificates of deposit or shares in banks, savings and loan, thrift, building and loan and homestead associations, credit unions, brokerage houses, pension funds and the like? [If so, give name and address of each institution, number and nature of account, current balance, and name and address of every other person authorized to make withdrawals from the account. Such accounts should also be listed in Item 13b.]
- b.** Does either of you currently keep any safe deposit boxes or other depositories? [If so, give name and address of bank or other depository, name and address of every other person who has a right of access thereto, and a brief description of the contents thereof, which should also be listed in Item 13b.]

8. Prior Bankruptcy.

What cases under the Bankruptcy Act or Bankruptcy Code have previously been brought by or against you or either spouse filing a petition? (State the location of the bankruptcy court, the nature and number of each case, the date when it was filed, and whether a discharge was granted or denied, the case was dismissed, or a composition, arrangement, or plan was confirmed.)

9. Foreclosures, executions, and attachments. (To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed.)

- a.** Is any of the property of either of you, including real estate, involved in a foreclosure proceeding, in or out of court? (If so, identify the property and the person foreclosing.)
- b.** Has any property or income of either of you been attached, garnished, or seized under any legal or equitable process within the 90 days immediately preceding the filing of the original petition herein? (If so, describe the property seized, or person garnished, and at whose suit.)

10. Repossessions and returns.

(To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed.)

Has any property of either of you been returned to, repossessed, or seized by the seller or by any other party, including a landlord, during the 90 days immediately preceding the filing of the original petition herein? (If so, give particulars, including the name and address of the party taking the property and its description and value.)

11. Transfers of Property.

(To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed unless spouses are separated and a single petition is filed.)

- a.** Has either of you made any gifts, other than ordinary and usual presents to family members and charitable donations, during the year immediately preceding the filing of the original petition herein? (If so, give names and addresses of donees and dates, description and value of gifts.)
- b.** Has either of you made any other transfer, absolute or for the purpose of security, or any other disposition of real or personal property during the year immediately preceding the filing of the original petition herein? (Give a description of the property, the date of the transfer or disposition, to whom transferred or how disposed of, and, if the transferee is a relative or insider, the relationship, the consideration, if any, received therefor, and the disposition of such consideration.)

12. Debts.

(To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed.)

a. Debts Having Priority.

(1) Nature of Claim	(2) Name of creditor, account number, and complete mailing address including zip code	(3) Specify when claim was incurred and the consideration there- for; when claim is subject to setoff, evidenced by a judgment, negotiable instrument, or other writing	(4) Indicate if claim is contingent, unliquidated, or disputed	(5) Amount of claim
1. Wages, salary, and commissions, including vacation, severance and sick leave pay owing to employees not exceeding \$10,000 to each, earned within 180 days before filing of petition or cessation of business (if earlier specify date.)				\$ _____
2. Contributions to employee benefit plans for services rendered within 180 days before filing of petition or cessation of business (if earlier, specify date.)				\$ _____
3. Deposits by individuals, not exceeding \$2,225 for each, for purchase, lease, or rental of property or services for personal, family, or household use that were not delivered or provided.				
4. Claims of a spouse or child for alimony, maintenance, or support				\$ _____
5. Taxes owing (itemize by type of tax and taxing authority)				
(A) To the United States				\$ _____
(B) To any state				\$ _____
(C) To any other taxing authority				\$ _____
Total				_____

b. Secured Debts. List all debts which are or may be secured by real or personal property. (Indicate in sixth column, if debt is payable in installments, the amount of each installment, the installment period [monthly, weekly, otherwise], and number of installments in arrears, if any. Indicate in last column whether husband or wife is solely liable, or whether you are jointly liable.)

Creditor's name, account number and complete mailing address, including zip code	Consideration or basis for debt	Amount claimed by creditor	If disputed, amount admitted by debtor	Description of collateral (include year and make of automobile)	Installment amount, period and number of installments in arrears	Husband or wife, solely liable or jointly liable
Total secured debts						

c. Unsecured Debts. List all other debts, liquidated and unliquidated, including taxes, attorney's fees, and tort claims.

Creditor's name, account number, and complete mailing address, including zip code	Consideration or basis for debt	Amount claimed by Creditor	If disputed, amount admitted by Debtor	Husband or wife, solely liable or jointly liable
Total unsecured debts \$ _____				_____

13. Codebtors. (to be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed.)

- a.** Are any other persons liable, as cosigners, guarantors, or in any other manner, on any of the debts of either of you or is either of you so liable on the debts of others? (If so, give particulars, indicating which spouse is liable and including names of creditors, nature of debt, names and addresses of codebtors, and their relationship, if any, to you.)

- b.** If so, have the codebtors made any payments on the debts? (Give name of each codebtor and amount paid by codebtor.)

- c.** Has either of you made any payments on the debts? (If so, specify total amount paid to each creditor, whether paid by husband or wife, and name of codebtor.)

14. Property and Exemptions.

(To be answered by debtor, if unmarried, otherwise for each spouse whether single or joint petition is filed.)

- a. Real Property.** List all real property owned by either of you at date of filing of original petition herein.

(Indicate in last column whether owned solely by husband or wife, or jointly.)

Description and location of property	Name of any coowner other than spouse	Present market value (without deduction for mortgage or other security interest)	Amount of mortgage or other security interest on this property	Name of mortgagee or other secured creditor	Value claimed exempt (specify federal or state statute creating the exemption)	Owned solely by husband or wife or jointly

b. Personal Property. List all other property, owned by either of you at date of filing of original petition herein.

Description	Location of property if not at debtor's residence	Name of coowner other than spouse	Present market value (without deduction for mortgage or other security interest)	Amount of mortgage or other security interest on this property	Name of mortgagee or other secured creditor	Value claimed exempt (specify federal or state statute creating the exemption)	Owned solely by husband or wife or jointly
Autos [give year and make]							
Household goods							
Personal effects							
Cash or financial account							
other (specify) _____							

(To be signed by both spouses when joint petition is filed.)

I, _____, (if joint petition is filed and I, _____,)

declare under penalty of perjury that I have read the answers contained in the foregoing statement, consisting of _____ sheets, and that they are true and complete to the best of my knowledge, information, and belief.

Husband (or Debtor) _____

Wife _____

Date _____