

**BK QUESTIONNAIRE**

Please print all of your answers completely and legibly. Please answer each question fully. If it does not apply to you or the answer is none, please write N/A in the space provided. If you are married, you must complete information for both you and your spouse, even if only one is seeking our services.

**MARITAL STATUS:** Single \_\_\_\_\_ Married \_\_\_\_\_ Separated \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed \_\_\_\_\_

**SELF:**  
LAST NAME: \_\_\_\_\_  
FIRST NAME: \_\_\_\_\_  
MIDDLE: \_\_\_\_\_  
SS#: \_\_\_\_\_  
PHYSICAL ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE: \_\_\_\_\_  
ZIP CODE: \_\_\_\_\_

**SPOUSE:**  
LAST NAME: \_\_\_\_\_  
FIRST NAME: \_\_\_\_\_  
MIDDLE: \_\_\_\_\_  
SS#: \_\_\_\_\_  
PHYSICAL ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE: \_\_\_\_\_  
ZIP CODE: \_\_\_\_\_

If you have a present mailing address that is different from your present physical address please write it below:

**SELF:**  
MAILING ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE: \_\_\_\_\_  
ZIP CODE: \_\_\_\_\_  
EMAIL: \_\_\_\_\_

**SPOUSE:**  
MAILING ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE: \_\_\_\_\_  
ZIP CODE: \_\_\_\_\_  
EMAIL: \_\_\_\_\_

How long have you lived at this address? \_\_\_\_\_ YEARS \_\_\_\_\_ MONTHS

If less than three (3) years, please list all previous physical addresses for the past three (3) years and the dates lived here:

\_\_\_\_\_

**SELF:**  
PHONE: \_\_\_\_\_  
WORK: \_\_\_\_\_  
CELL: \_\_\_\_\_  
EMAIL: \_\_\_\_\_  
DL#: \_\_\_\_\_ STATE: \_\_\_\_\_  
DOB: \_\_\_\_\_

**SPOUSE:**  
PHONE: \_\_\_\_\_  
WORK: \_\_\_\_\_  
CELL: \_\_\_\_\_  
EMAIL: \_\_\_\_\_  
DL#: \_\_\_\_\_ STATE: \_\_\_\_\_  
DOB: \_\_\_\_\_

All Other Names Used in Last 6 Years: \_\_\_\_\_

HAVE EITHER OF YOU FILED BANKRUPTCY BEFORE? YES / NO

IF YES, state who, when and where:

\_\_\_\_\_

**PROPERTY QUESTIONS**

REAL PROPERTY:

MARKET VALUE:    CURRENT LOAN:

1. Address: \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
Example: Residence — Rental Property — Business Property — Land — Burial Site

Address: \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
Example: Residence — Rental Property — Business Property — Land — Burial Site

Has your name or your spouse's name ever been on the property at any time? Yes / No

If Yes, explain: \_\_\_\_\_

How long have you had your house under your name? \_\_\_\_\_

Does you have an Accessory Dwelling Unit (ADU) on the same property as your home? \_\_\_\_\_

Have you ever been convicted of any crimes? \_\_\_\_\_

**PERSONAL PROPERTY**

2. Motor Vehicles and Accessories:

Year:	Make:	Model:	Mileage:	Paid off/Financed/Leased
Year:	Make:	Model:	Mileage:	Paid off/Financed/Leased
Year:	Make:	Model:	Mileage:	Paid off/Financed/Leased

3. Boats, Motors, and Accessories /Aircraft and Accessories: \_\_\_\_\_

4. Household Goods & Furnishings (Total garage sale value): \_\_\_\_\_

5. Electronics (Total garage sale value): \_\_\_\_\_

6. Collectibles of value: \_\_\_\_\_

7. Sports, photo, exercise, and other hobby equipment or musical instruments: \_\_\_\_\_

8. Firearms, ammunition, and related equipment: \_\_\_\_\_

9. Clothes (Total garage sale value): \_\_\_\_\_

10. Jewelry: \_\_\_\_\_

11. Pets/non-farm animals: \_\_\_\_\_

12. Health aids and all other household items not listed: \_\_\_\_\_

13. Cash/Checks on Hand: \_\_\_\_\_

14. Bank Name, Address, Type (Checking/Saving/CD) & Account #: \_\_\_\_\_

Bank Name, Address, Type (Checking/Saving/CD) & Account #: \_\_\_\_\_

15. Bonds, mutual funds, and publicly traded stocks: \_\_\_\_\_

16. Non-publicly traded stocks and interests in businesses, corporations, LLCs, partnerships, and joint ventures  
(list % of ownership): \_\_\_\_\_

17. Government and corporate bonds and instruments (including U.S. Savings Bonds): \_\_\_\_\_

18. Retirement, pension, or profit-sharing plan #1 (IRA,401(k), 403(b), thrift savings account, or other pension or  
profit-sharing plan) (list type of plan and where the account is held): \_\_\_\_\_

19. Security Deposits: \_\_\_\_\_

20. Annuities: \_\_\_\_\_

21. Education IRAs: \_\_\_\_\_

22. Trusts, life estates, future, and equitable interests in property or assets: \_\_\_\_\_

23. Patents, copyrights, trademarks, trade secrets, and other intellectual property: \_\_\_\_\_

24. Licenses, franchises, and other general intangibles: \_\_\_\_\_

25. Tax refunds owed to you (list years due): \_\_\_\_\_

26. Alimony, Support, etc.: \_\_\_\_\_

27. Other Debts Owed to Debtor: \_\_\_\_\_



Gross wages **PER PAY CHECK** (please select only one pay period per Debtor)

SELF		SPOUSE	
	WEEKLY		WEEKLY
	EVERY TWO WEEKS		EVERY TWO WEEKS
	TWICE MONTHLY		TWICE MONTHLY
	MONTHLY		MONTHLY
	OTHER(EXPLAIN)		OTHER(EXPLAIN)

PAYCHECK INCOME:	SELF	SPOUSE
How much are you paid per paycheck gross?	\$	\$
Amount of overtime per pay period, if any?	\$	\$

OTHER INCOME (CASH, SUPPORT, EDD, SSI, SSA, DISABILITY, ALIMONY, CHILD SUPPORT)	\$	\$
<b>Total Monthly Net Income (Office Use Only)</b>	\$	\$

**MONTHLY EXPENSES: Please answer these as completely as you can by using monthly averages:**

1. Residential Rent/Mortgage	1.
2. Real Estate Taxes	2.
3. Property, homeowner, or renter Insurance	3.
4. Home maintenance, repair, and upkeep expenses	4.
5. Homeowner association or condominium dues	5.
6. Additional mortgage payments for residence, such as home equity loans	6.
7. Electricity, heat, natural gas	7.
8. Water, sewer, garbage collection	8.
9. Telephone, cell phone, Internet, satellite, and cable	9.
10. Other Utilities	10.
11. Food and housekeeping supplies	11.
12. Childcare and children's education costs	12.
13. Clothing, laundry and dry cleaning	13.
14. Personal care products and services	14.
15. Medical and dental expenses	15.
16. Transportation (gas, train, etc.)	16.
17. Entertainment	17.
18. Charitable contributions and religious donations	18.
19. Life Insurance	19.
20. Health Insurance	20.
21. Vehicle Insurance	21.
22. Other Insurance	22.
23. Taxes	23.
24. Car Payment 1	24.
25. Car Payment 2	25.
26. Other Payment	26.
27. Payments of Alimony, Maintenances, and Support	27.
28. Other Support	28.
29. Other real property expenses	29.

**TOTAL MONTHLY EXPENSES: ..... TOTAL: \$** \_\_\_\_\_

**STATEMENT OF FINANCIAL AFFAIRS**

1. List every address where you have lived other than where you live now during the last 3 years.  
 Previous address(es): \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_  
 Previous address(es): \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_
2. Income from Employment or Operation of Business:
 

2026 (YTD)	Self: _____	Spouse: _____
2025	Self: _____	Spouse: _____
2024	Self: _____	Spouse: _____
3. Income OTHER THAN from Employment or Operation of Business:
 

2026 (YTD)	Self: _____	Spouse: _____
2025	Self: _____	Spouse: _____
2024	Self: _____	Spouse: _____
4. Consumer debt payments (i.e. non-business), \$7575 or more within the last 90 days: \_\_\_\_\_
5. List all payments that you made within the past 1 year to any "insider." \_\_\_\_\_
6. List all payments or transfers of property that you made within the past 1 year that benefited an "insider." \_\_\_\_\_
7. \_\_\_\_\_  
 Lawsuits, court actions. Or administrative proceeding (1 year): \_\_\_\_\_
8. \_\_\_\_\_  
 All property that has been repossessed, foreclosed, garnished, attached, seized, or levied (1 year): \_\_\_\_\_
9. \_\_\_\_\_  
 List all setoffs (deduction by bank due to money you owe. 90 days): \_\_\_\_\_
10. \_\_\_\_\_  
 Assignment of property for the benefit of creditors: \_\_\_\_\_
14. \_\_\_\_\_  
 List any gifts given more than \$600 (2 years): \_\_\_\_\_
15. \_\_\_\_\_  
 List all losses (theft, disaster & gambling): \_\_\_\_\_
16. \_\_\_\_\_  
 Payment related to bankruptcy: \_\_\_\_\_
17. \_\_\_\_\_  
 Payment for help dealing with creditors (1 year): \_\_\_\_\_
18. \_\_\_\_\_  
 Property/business transfers (past 5 years): \_\_\_\_\_
19. \_\_\_\_\_  
 Self-settled trusts of which the debtor is a beneficiary: \_\_\_\_\_
20. \_\_\_\_\_  
 Closed financial accounts: \_\_\_\_\_
21. \_\_\_\_\_  
 Safe deposits boxes: \_\_\_\_\_
22. \_\_\_\_\_  
 List any storage unit or place other than your home in which you have stored property within the past 1 year: \_\_\_\_\_
23. \_\_\_\_\_  
 List all property that you hold or control that is owned by someone else: \_\_\_\_\_
24. \_\_\_\_\_  
 Notice of liability under an environmental law: \_\_\_\_\_
25. \_\_\_\_\_  
 Notice of hazardous material release: \_\_\_\_\_
26. \_\_\_\_\_  
 Judicial or administrative proceeding under any environmental law: \_\_\_\_\_
27. \_\_\_\_\_  
 Ownership or connections to a business (past 5 years): \_\_\_\_\_
28. \_\_\_\_\_  
 Do you have any documents regarding bookkeeping, inventory, AR, AP? \_\_\_\_\_

**CREDIT CARDS:**

1. When were the credit cards first opened? \_\_\_\_\_
2. When was the last date of your use? \_\_\_\_\_
3. When did you last make payments? \_\_\_\_\_
4. Did you open the credit cards yourself? \_\_\_\_\_
5. If someone else opened the credit cards, do you have copies of any documents (i.e. Credit application) you signed? \_\_\_\_\_

*I certify that the information given above in this questionnaire is true and correct and my listing of assets, debts as follows, income & expenses is complete to the best of my knowledge.*

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

**By law, you are required to list all creditors regardless of your intent to pay back the debt**