JOY GOODWIN, TRUSTEE Revised 11/08

CHAPTER 13 ATTORNEY CHECKLIST

Please use this checklist as a cover sheet and provide all information to the trustee AT THE TIME OF THE FILING OF THE CASE. Please email or deliver the documents. DO NOT FILE WITH THE COURT. Joy will continue the 341 if the Checklist is not received 1 week before the 341.

Case No. ____________ Name __________________________________

Attorney ___________________________

Check all that are applicable

If the debtor(s) own real property the following information is required:
Current year tax appraisal(s) are required if the debtor owns any interest in real estate or a mobile home. Tax appraisals are _____ enclosed or _____ N/A.
Date the property was purchased ______________ Purchase price _____________
All mortgages or liens on the property, including current balance on each.
____
Monthly payment on each mortgage and whether it includes taxes and insurance
____
Cost of taxes and insurance __________________
Is the property currently insured ? ______ Yes _____ No
Rental income for each property, if applicable.
____
Cost of upkeep and maintenance on each property.
____

REGARDING THE DEBTOR'S PAY, PLEASE ANSWER THE FOLLOWING:
The first debtor listed in the budget is paid (please select only one below as an aid to the trustee in interpreting the pay stubs provided)
_____ Once per week
_____ Once every two weeks
_____ Twice per month on the following dates ______________________
_____ Once per month
_____ On a commission basis only
_____ Hourly at $_______ per hour at an average of _____ hours per week

The second debtor listed in the budget is paid
_____ Once per week
_____ Once every two weeks
_____ Twice per month on the following date ______________________
_____ Once per month

_____ On a commission basis only
_____ Hourly at $_______ per hour at an average of _____ hours per week
NOTE THAT A COPY OF THE DEBTOR'S MOST RECENT PAYSTUB MUST ALSO BE PROVIDED TO THE TRUSTEE AT THE 341 MEETING PER RULE 4002.

Has debtor received a loan from a retirement account? _____ Yes _____ No
If yes, provide copy of loan document

Enclose a copy of the most recent final federal tax return signed by the debtor. You should redact the social security numbers and names of any minor children or spouse, if not a joint debtor.

Provide copies of statements from each of the debtor's depositories or investment accounts, including checking, savings, and money market accounts, mutual funds and brokerage accounts **for the time period that includes the date of the filing of the petition.**
Statements are _____ enclosed or _____ the debtor has no accounts.

I certify that in preparation of the debtor's bankruptcy schedules this office has reviewed the information provided to the trustee herewith and that on ____________ I provided a copy to the trustee as follows:
_____ by US mail
_____ by hand delivery
_____by email

____
(signature of attorney or employee of attorney's office on behalf of attorney)