

3.. Enclose a copy of the most recent final tax return signed by the debtor or with proof of electronic filing if applicable, or a transcript of that return. All pages and attachments must be included. **DO NOT SEND ORIGINALS AS THEY MAY BE DESTROYED AND WILL NOT BE RETURNED.** You may redact (mark through) the social security numbers and names of any minor children or spouse, if not a joint debtor. Please check all of the following that are applicable:

- _____ The debtor(s) have filed all required tax returns
_____ A copy of the last tax return filed or a transcript is enclosed
_____ A copy of the tax return or a transcript cannot be provided because (please explain)
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4. If the debtor is self-employed, that is, he or she does not receive a paycheck from another entity with taxes withheld from his or her pay, or if the debtor owns an interest in a business, please provide the following:

- _____ Business questionnaire with attachments enclosed
_____ If the business files a tax return that is separate from the debtor's personal return, a copy of that most recent return or a transcript thereof is enclosed. If these cannot be provided, please explain below
_____ The business questionnaire/tax return/transcript (circle as applicable) cannot be provided or should not be required in this case because:
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5. If the debtor(s)' budget includes an expense for charitable contributions, provide proof of charitable contributions made by the debtor within six months prior to the filing of the case.

Proof of charitable contributions is: _____ enclosed _____ N/A

6. Provide an itemization of unreimbursed medical and/or any monthly expenses of a non-filing spouse if such expenses are included in the debtor(s)' list of necessary expenses in the budget filed with the court above the local or national standards.

Proof of such expenses are: _____ enclosed _____ N/A

7. 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.

8. Provide documentation of any variation from the standard allowed expenses due to "special circumstances", including a written statement of the reason for the additional expense or variance.

Documentation is

- _____ enclosed
_____ there has been no variation from the standards

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:

(date)

- _____ *by US Mail*
_____ *by hand delivery*
_____ *by electronic transmission*

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

Date: _____

CHAPTER 13 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 check with your trustee for the preferred and effective method of transmittal.

Case no.: _____ Debtor's name: _____

Attorney: _____

Check all that are applicable

1. Current year tax appraisal(s) are required if the debtor owns any interest in real estate or a mobile home. Tax appraisals are

_____ Enclosed

_____ N/A

2. The last six month's worth of pay stubs from the debtor(s)' current employment are required or other documents providing proof of the debtor(s)' average monthly income for that period.

_____ Pay stubs are enclosed

_____ Cannot be obtained because (please explain)

REGARDING THE PAY STUBS PROVIDED 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.

PLEASE SELECT ONLY ONE!

The second debtor listed in the budget (if it is a joint petition) 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.

PLEASE SELECT ONLY ONE!

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 LOAN FROM A RETIREMENT ACCOUNT? YES NO
IF YES, PROVIDE COPY OF LOAN DOCUMENT

IF DEBTOR CONTRIBUTES TO A RETIREMENT ACCOUNT, HAVE PAYMENTS COMMENCED OR INCREASED WITHIN 1 YEAR? YES NO
IF YES, EXPLAIN _____

LIST NUMBER OF PEOPLE WHO ACTUALLY RESIDE FULL-TIME IN THE HOUSEHOLD: _____