

**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)