

**IN THE UNITED STATES BANKRUPTCY COURT
FOR THE NORTHERN DISTRICT OF TEXAS
FORT WORTH DIVISION**

IN RE: § **CASE NO.**
§
§
§
DEBTOR(S) § **CHAPTER 13**

AFFIDAVIT CONCERNING EXCESS TAX REFUND

The undersigned Debtor(s) _____ appeared on this day personally and state(s):

“My name is _____ and I/we am/are over the age of eighteen (18) and have the authority to make this affidavit and have personal knowledge of the statements contained herein, all of which are true and correct.”

“I/We received a Tax Refund for the _____ tax year in the amount of \$_____. Due to extenuating circumstances, I/we need to use or have used my/our Tax Refund for unanticipated expenditures that exceeded our monthly budget as reflected on our most recent expense schedule filed with the United States Bankruptcy Court. Those unanticipated expenses are as follows:”

1. _____
2. _____
3. _____
4. _____

[receipts or other documentation must be attached to this affidavit]

“Therefore I/we are requesting that I/we retain all/part of the Tax Refund in the amount of \$_____ due to unexpected expenses for which the Tax Refund may be used and that my/our Chapter 13 Plan not be modified to capture the Excess Refund.”

“Signed by me/us under penalty of perjury.”

Debtor

Joint Debtor

Dated: _____

BASSEL OFFICE (FORT WORTH) CONTACT INFORMATION:

EMAIL: basseltaxreturns@fwch13.com

FAX: 817-916-4737

MAIL: Pam Bassel, Chapter 13 Trustee
7001 Blvd 26, Suite 150
North Richland Hills, TX 76180