**DEBTORS STATEMENT OF FINANCIAL AFFAIRS**

Please complete and return to DRS asap:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D/O/B \_\_\_\_\_\_\_\_\_\_\_\_ SS# \_\_\_\_\_\_\_\_\_\_\_\_

Name: (Spouse) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D/O/B \_\_\_\_\_\_\_\_\_\_\_\_ SS# \_\_\_\_\_\_\_\_\_\_\_\_\_

Married? \_\_\_\_\_\_\_\_\_ Single? \_\_\_\_\_\_\_\_\_ Separated? \_\_\_\_\_\_\_\_\_ Divorced? \_\_\_\_\_\_\_\_\_\_\_\_

Children’s names and ages if living with you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State Zip\_\_\_\_\_\_\_\_\_

Home phone # \_\_\_\_ Alternative\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail:\_\_\_\_\_\_\_\_\_\_\_\_\_

Emergency contact name: \_\_\_ Phone Number\_\_\_\_\_\_\_\_ \_\_\_\_

**EMPLOYMENT INFORMATION**

Employer (If applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employer's Address & Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Job Title (If applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ How long employed? \_\_\_\_\_\_\_\_\_\_\_

Gross Monthly Income: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Other Income & Source: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**HOUSING INFORMATION**

Own or Rent? \_\_\_\_\_\_\_\_\_\_\_\_ Amt. of Rent or Mtg? \_\_\_\_\_\_\_\_\_\_\_ Current? \_\_\_\_\_\_\_\_\_\_\_\_

Ever filed for bankruptcy? Is so, when?\_\_\_\_\_\_\_\_\_ 7 or 13? (circle) Discharge Date: \_\_\_\_\_\_

 BK Clients Only: # Persons in Household? \_\_\_\_ Total *Household* Income (last 6 mos): \_\_\_\_\_

Are you in the midst of a foreclosure or eviction? \_\_\_\_\_\_\_ Sheriff’s Sale Pending? \_\_\_\_\_\_\_\_\_\_

Have you saved any money for a new house down payment? How much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Income from employment or operation of business:**

How much gross income did you receive from your employment or profession, or from the operation of a business, including part-time activities, from the beginning of this calendar year to the filing date ? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

State also the gross amounts received by you personally during the **two years** immediately preceding this calendar year: 2013: \_\_\_\_\_\_\_\_\_ 2012: \_\_\_\_\_\_\_\_\_\_\_

What was your husband’s income for 2014 to date? \_\_\_\_\_ 2013: \_\_\_\_\_\_\_ 2012: \_\_\_\_\_\_

**2. Suits and administrative proceedings, executions, garnishments and attachments**

List all lawsuits that were filed against you personally within the last year, including those to which you may have been a co-party or co-signer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have you had any property or paychecks attached or garnished or seized within **one year** immediately preceding the commencement of this case. If so who?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Repossessions, foreclosures and returns**

List all property that has been repossessed by a creditor or sold at a foreclosure sale within **one year** immediately preceding the commencement of this case: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. Assignments and receiverships**

Describe any property you may have given back to a creditors within **120 days** immediately preceding the commencement of this case:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5. Gifts**

List all gifts or charitable contributions (and the approximate date, including church) you made within **one year** immediately preceding the commencement of this case over $100: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**6. Losses**

Did you suffer any losses from fire, theft, other casualty or gambling within **one year** immediately preceding the commencement of this case? If so, how, much, when, and where?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**7. Payments related to debt counseling or bankruptcy**

Other than to DRS, did you pay any attorneys or debt counseling firms for advice of assistance in 2014? ( ) yes; ( ) no

**8. Other transfers**

Did you transfer by deed, gift, or assignment any other property to anyone or a trust within **ten years** immediately preceding the commencement of this case? If so, to whom, how much, and when? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**9. Closed financial accounts**

List all financial accounts and instruments (bank accounts, CD’s investment accounts) held in the name of the debtor or for your benefit which were closed or transferred within **one year** immediately preceding the commencement of this case. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**10. Safe deposit boxes**

List any safe deposit or other box or depository in which the debtor has or had securities, cash, or other valuables within **one year** immediately preceding the commencement of this case. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**11. Setoffs**

Within **90 days** preceding the commencement of this case, have you had any transaction with people where any money you owed them was off-set by money they owe you? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**12. Property held for another person**

Do you hold any property owned by another person in your name? If so, describe? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**13. Prior address of debtor**

Have you lived anywhere else within **three years** immediately preceding the commencement of this case? If so, where and when? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**14. Do you have any income from:**

a. Real property? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. Interest and dividends? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

c. Alimony, maintenance or child support? If so, describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

d. Social security, disability, or government assistance? If so, describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

e. Pension or retirement income? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**15: Do you owe any back state of federal income taxes? If so, describe:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**16. What property do you have and still owe on that you would like to give back or keep during this bankruptcy (i.e. house, car, credit cards, jewelry)? How much is owed?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SCHEDULE J – Household Budget:**

**Please list the amount of your monthly expenditures for**

1. Rent or home mortgage payment (include lot rented for mobile home) $ \_\_\_\_\_\_\_\_\_\_\_\_

a. Are real estate taxes included? Yes \_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_

b. Is property insurance included? Yes \_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_

2. Utilities: a. Electricity and heating fuel $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. Water and sewer $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

c. Telephone $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

d. Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Home maintenance (repairs and upkeep) $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Food $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Clothing $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Laundry and dry cleaning $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Medical and dental expenses $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. Transportation (not including car payments) $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Recreation, clubs and entertainment, newspapers, magazines, etc. $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Charitable contributions $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. Insurance (not deducted from wages or included in home mortgage payments)

a. Homeowner’s or renter’s $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. Life $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

c. Health $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

d. Auto $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

e. Other $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

12. Back tax Payments (not including real estate) (Specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13. Car payment: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

14. Alimony, maintenance, and support paid to others $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

15. Payments for support of additional dependents **not** living at your home $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

16. Regular expenses from operation of business, profession, or farm : $ \_\_\_\_\_\_\_\_\_\_\_\_\_

17. Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 AVERAGE MONTHLY EXPENSES: (Total lines 1-17) $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Describe any increase or decrease in expenditures reasonably anticipated to occur within the year following the filing of this document: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SCHEDULE B**

1. How much pocket money do you have right now? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. List your checking, savings or other financial accounts:

Kind of account? \_\_\_\_\_\_\_\_\_\_\_\_ Where? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Balance? $ \_\_\_\_\_\_\_\_\_\_\_\_

Kind of account? \_\_\_\_\_\_\_\_\_\_\_\_ Where? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Balance? $ \_\_\_\_\_\_\_\_\_\_\_\_

Kind of account? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Where? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Balance? $ \_\_\_\_\_\_\_\_\_\_

Do you have any security deposits with public utilities, telephone companies, landlords,

or others? Describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. How many rooms of Household goods and furnishings, including audio, video, and computer equipment do you have? \_\_\_\_\_\_ If you sold them all at a yard sale, how much would you expect to earn? $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Do you own any valuable Books; pictures and other art objects; antiques; stamp, coin, record, tape, compact disc, and other collections or collectibles? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. At your yard sale, how much would your wearing apparel likely fetch? $ \_\_\_\_\_\_\_\_\_\_\_

How much for your furs? $\_\_\_\_\_\_\_\_\_\_\_\_\_ jewelry? $\_\_\_\_\_\_\_\_\_\_\_ firearms $\_\_\_\_\_\_\_\_

Sports, photographic, and hobby equipment $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Do you have any interests in life insurance policies? Name insurance company of each policy and itemize surrender or refund value of each, if any?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. Do you own any Annuities (insurance that pays you monthly)? If so, itemize and name each issuer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Do you have any interest in an education IRA? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Do you have any interest in IRA, ERISA, Keogh, or other pension or profit sharing plans? If so, give particulars:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. Do you have any interest in stocks or any businesses? If so, itemize: \_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

12. Do you have any interest Interests in partnerships or joint ventures. If so, itemize: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13. Do you own any government or corporate bonds or other instruments?\_\_\_\_\_\_\_\_\_\_

14. Does anyone owe you any sizeable amount of money? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

15. Are you owed any back alimony, maintenance, support, or property settlements? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

16. Do you anticipate getting an income tax refund this year? If do, how much? $\_\_\_\_\_\_

17. Do you anticipate inheriting any property soon? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

18. Do you anticipate getting any benefits from any lawsuits or claims? If so, describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

19. Own any patents, copyrights, and other intellectual property? Give particulars: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

20. Own any licenses, franchises, and other general intangible property rights (I.e. royalties, fees, etc.). Give particulars: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

21. List your automobiles, trucks, trailers, or other vehicles: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How much is each worth? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

22. Own any boats or aircraft? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

23. Own any unused business equipment or stored items used in business? \_\_\_\_\_\_\_\_\_\_

If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_