

Bankruptcy Intake Form – The Belsky Law Firm

Section A — General Information

Today's Date

Married?

Filed Bankruptcy Before? (If so, when?)

Case/District (if known)

Debtor — First, Middle, Last

Spouse — First, Middle, Last

Debtor SSN

Spouse SSN

Debtor DOB

Spouse DOB

Home Phone

Debtor Work

Spouse Work

Debtor Cell

Spouse Cell

Email

Spouse Email

Household Size (#)

Residential & Mailing Address

Residential Address — Street, City, County, State, Zip

Mailing Address (if different) — Street, City, County, State, Zip

Have you lived at this address for the past 3 years?

☐ Yes

☐ No

If NO, list prior addresses (Address 1 —

Address 2 — dates in/out

Address 3 — dates in/out

Residency & Domestic Support Obligations

Have you lived in this state for the last 2 years?

☐ Yes

☐ No

If NO, prior state

When did you move to this state?

Do you owe child support or alimony?

☐ Yes

☐ No

Monthly support obligation (amount)

Person receiving support — Name & Address

Are you current on support?

☐ Yes

☐ No

If NO, how much are you behind?

Inheritances, Lawsuits & Amounts Owed to You

Expecting any inheritances or lawsuit settlements?

☐ Yes

☐ No

If YES, explain

Does anyone owe you more than \$1,000?

☐ Yes

☐ No

If YES, explain (who, how much

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Section B — Real Property (Homes, Buildings, Land)

Property 1 — Address

Type (Single Family / Rowhome / Townhome / Condo / Duplex / Building / Land)

Purchase Price

Year Purchased

Number of Mortgages

1st Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

2nd Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

Additional Mortgages / HOA (describe)

Do you wish to keep this property?

☐ Yes

☐ No

How is it titled? (all names on deed)

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Property 2 — Address

Type (Single Family / Rowhome / Townhome)

Purchase Price

Year Purchased

Number of Mortgages

1st Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

2nd Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

Additional Mortgages / HOA (describe)

Do you wish to keep this property?

☐ Yes

☐ No

How is it titled? (all names on deed)

Property 3 — Address

Type (Single Family / Rowhome / Townhome)

Purchase Price

Year Purchased

Number of Mortgages

1st Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

2nd Mortgage Company

Payment / Month

Payment Due Date

Total Owed

Months Behind

Are taxes & insurance included (escrow)?

☐ Yes

☐ No

Additional Mortgages / HOA (describe)

Do you wish to keep this property?

☐ Yes

☐ No

How is it titled? (all names on

Have you owned any other real property in the last 3 years? ☐ Yes ☐ No

If YES, explain (address and c

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Section C — Personal Property & Financial Accounts

Cash on hand?

☐ Yes

☐ No

Typical cash carried (\$)

Bank 1 — Name & Location

Account Balance (now)

Type (Checking / Savin

Additional names on account

Bank 2 — Name & Location

Account Balance (now)

Type (Checking / Savin

Additional names on account

Bank 3 — Name & Location

Account Balance (now)

Type (Checking / Savin

Additional names on account

Any security deposits (rent, BGE, etc.)?

☐ Yes

☐ No

Security deposit(s) — holder & amount

Life insurance policies owned?

☐ Yes

☐ No

Policy Type (Term / Universal / Whole)

Cash Surrender Value (Whole Life only)

Pensions / retirement accounts?

☐ Yes

☐ No

Type (401k/403b/IRA/Gov't/T

Approx. Value

Whose name on account?

Type (401k/403b/IRA/Gov't/T

Approx. Value

Whose name on account?

Any bonds or stock?

☐ Yes

☐ No

List bonds/stock & current market value

Will/did you receive a tax refund for last tax year?

☐ Yes

☐ No

State (\$)

Federal (\$)

Currently or recently involved in any lawsuits/claims?

☐ Yes

☐ No

Date of injury / claim

Attorney handling & contact info

Brief description of lawsuit/claim

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Section D — Business Ownership / Self-Employment

Do you own a business or are you self-employed?

☐ Yes

☐ No

Business Name & Address

Is it incorporated?

☐ Yes

☐ No

Inception Date

End Date (if any)

Current/former partners & addresses

Type of business (what it does/sells)

Household Personal Property — Estimates

Televisions (#)

Stereo (#)

Computer (#)

Microwave (#)

Lamps (#)

Sofas (#)

Beds (#)

Tables (#)

Chairs (#)

Suits (#)

Dresses (#)

Shirts (#)

Pants (#)

Shoes (#)

Other valuable personal property (collectibles, etc.)

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Section E — Motor Vehicles (Cars, Boats, ATVs, etc.)

(1) Year/Make/Model

Car Loan Company

Payment Due Date

Months Behind

Keeping this vehicle?

(2) Year/Make/Model

Car Loan Company

Payment Due Date

Months Behind

Keeping this vehicle?

(3) Year/Make/Model

Car Loan Company

Payment Due Date

Months Behind

Keeping this vehicle?

(4) Year/Make/Model

Car Loan Company

Payment Due Date

Months Behind

Keeping this vehicle?

Additional vehicles / sports vehicles (boat)

Owned any other vehicles in last 3 years no longer in your possession?

If YES, what happened? (sold, repossessed)

Mileage

Payment/Month (\$)

Total Owed (\$)

Titled Owner

☐ Yes ☐ No

Mileage

Payment/Month (\$)

Total Owed (\$)

Titled Owner

☐ Yes ☐ No

Mileage

Payment/Month (\$)

Total Owed (\$)

Titled Owner

☐ Yes ☐ No

Mileage

Payment/Month (\$)

Total Owed (\$)

Titled Owner

☐ Yes ☐ No

☐ Yes ☐ No

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Section F — Priority Taxes & Credit Union Loans

Do you owe income taxes?

☐ Yes

☐ No

Tax years owed

IRS (\$)

State of MD (\$)

Any loans with SECU/MECU/other Credit Union?

☐ Yes

☐ No

Name of bank / credit union

Co-signers on the loan?

☐ Yes

☐ No

If YES, list names & addresses

Section G — Current Income & Employment

Marital Status (Married/Sepa

Household YTD Gross (

Debtor Employer

Spouse Employer

Debtor Occupation

Spouse Occupation

Debtor Employer Address

Spouse Employer Addr

Debtor Employer Phone

Spouse Employer Phon

Debtor Payroll Fax

Spouse Payroll Fax

Debtor Length of Employmer

Spouse Length of Empl

Debtor Take-Home Pay (\$)

Spouse Take-Home Pa

Debtor Paid (Biweekly/Weekl

Spouse Paid (Biweekly/

Other income sources in household?

☐ Yes

☐ No

List other income types & monthly amou

Section H — Lawsuits & Judgments Against You

Is anyone suing you, or any judgments entered against you?

☐ Yes

☐ No

Case 1 — Court / Case Name / Case No

Case 2 — Court / Case Name / Case No

Case 3 — Court / Case Name / Case No

Case 4 — Court / Case Name / Case No

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Section I — Dependents

Dependent 1 — Relation

Age

Does this dependent live with you?

☐ Yes

☐ No

Dependent 2 — Relation

Age

Does this dependent live with you?

☐ Yes

☐ No

Dependent 3 — Relation

Age

Does this dependent live with you?

☐ Yes

☐ No

Dependent 4 — Relation

Age

Does this dependent live with you?

☐ Yes

☐ No

Section J — Monthly Expenses

Rent or Mortgage Payment (\$/mo)

Property Taxes (if not escrowed) (\$/mo)

Property Insurance (if not escrowed) (\$/mo)

Electricity/Heating (\$/mo)

Water/Sewage (\$/mo)

Telephone Service (\$/mo)

Other Utilities (list) (\$/mo)

Cell Phone (\$/mo)

Cable/Internet (\$/mo)

Home Maintenance (\$/mo)

Food (\$/mo)

Clothing (\$/mo)

Laundry/Dry Cleaning (\$/mo)

Medical/Dental (\$/mo)

Transportation (not car payments) (\$/mo)

Entertainment/Recreation (\$/mo)

Charitable Contributions (\$/mo)

Auto Insurance (\$/mo)

Taxes (not payroll) (\$/mo)

Car Payments (\$/mo)	
Alimony/Child Support/Family Maintenance	
Support for Dependents Not Living at Home	
Business Operation Expenses (\$/mo)	
Mandatory Payroll Deductions (\$/mo)	
Court-Ordered Payments (\$/mo)	
Education (to maintain employment) (\$/mo)	
Childcare (\$/mo)	
Education Expense for Child < 18 (\$/mo)	
Care for Elderly/III/Disabled Family Member	
Health Savings Account (\$/mo)	
Disability Insurance (\$/mo)	
Non-mandatory Contributions (e.g., retirement)	
Other Expenses Not Listed (\$/mo)	

Additional Notes

Notes / Explanations

Signatures

Debtor Signature (type name)

Date

Spouse Signature (if joint)

Spouse Signature Date