



Lund Law Office

a service corporation

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STEP ONE: INQUIRE

NAME: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

MARITAL STATUS: _____

YOU ARE (check all that apply):

- Individual with consumer debts
- Individual with both business and consumer debts
- Sole proprietor
- General or Limited Partnership
- Limited Liability Company
- Corporation (S Corp or C Corp)
- Owner of Income Property - Residential
- Owner of Income Property - Commercial

DO YOU OWN REAL ESTATE? (check all that apply):

- No
- Home - Primary Residence
- Second Residence
- Timeshare Unit
- Office Building
- Warehouse / Storage / Industrial
- Undeveloped Land
- Farm or Ranch

Combined market value of all property \$ _____

Combined value of all mortgages \$ _____

Combined value of all liens \$ _____

DO YOU RENT REAL ESTATE? (check all that apply):

- No
- Home - Residence
- Office
- Store
- Warehouse / Storage / Industrial
- Farm or Ranch

Total rent paid per month \$ _____

Total rent arrearages \$ _____

VEHICLES (check all that apply):

- No vehicles
- Automobile(s)
- Motorcycle(s) (include scooters)
- Snowmobile(s)
- ATV(s) / Off-road
- Boat(s)

Combined Value \$ _____

Combined Loan Payoff \$ _____

ACCOUNTS (check all that apply):

- No accounts
- Checking Account
- Savings Account
- Funds in Escrow (settlements etc)
- Health Savings Account
- Trust Account

Combined Value \$ _____

PERSONAL PROPERTY - (NON-BUSINESS)

- Household goods and furnishings
- Clothing and jewelry
- Appliances, Musical Instruments
- Books, DVDs, etc
- Firearms and Sporting Goods
- Electronics
- Collections
- Vehicle Equipment and Accessories
- Tools (non-business)

Combined Value of Personal Property \$ _____

BUSINESS PERSONAL PROPERTY

- Equipment
- Inventory
- Farm Products
- Professional Books
- Accounts Receivable
- Tools

Combined Value of Business Property \$ _____

Combined Liens and Loans on Property \$ _____

PRIORITY DEBTS (check all that apply):

- I filed a tax return for the most recent year
- I haven't filed taxes since _____
- Income Taxes Owed \$ _____
- Employee Wages Owed \$ _____
- Customer Deposits/Pre-payments/Trust Accounts Owed \$ _____
- Payroll Taxes Owed \$ _____
- Sales & Unemployment Taxes Owed \$ _____
- Wage income listed from latest tax return \$ _____
- Business income/loss (Sch. C & E) from last return \$ _____

STUDENT LOANS (check all that apply):

- None
- I have them. Total balance due: \$ _____
- I cosigned for them. Total balance due: \$ _____

UNSECURED DEBTS (check all that apply):

- None
- Personal credit card(s) (balance on all cards) \$ _____
- Business credit card(s) (balance on all cards) \$ _____
- Medical debts (total for all bills) \$ _____
- Business vendors, unsecured lines of credit etc. \$ _____

PREFERRED METHOD OF CONTACT (check all that apply):

- Email
- Phone
- Best time to reach you: _____

Congratulations, you've completed the first step toward addressing your finances and exploring your options for relief under the US Bankruptcy Code.

What next? Contact our office to set up an appointment, if you haven't already.