

THE LAW OFFICE OF TRACY A. BROWN, P.C.

ATTORNEYS AND COUNSELORS AT LAW

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ST. LOUIS, MISSOURI 63117

FAX:

(314) 644-0333

Name: _____

Date / Time of Appointment: _____ @ : _____ am / pm

**Please print and
complete the following
Documents. Bring all
pages with you to your
initial consultation.**

*Licensed to Practice Law in *Missouri* and *Texas* / Certified Public Accountant (CPA) in *Texas*

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To expedite the filing of your case, please bring the following information to your initial consultation:

_____ There is no charge due at the Initial Consultation; *however* if you would like us to get started on your case and retain our services, we suggest bringing a minimum of \$100 to your appointment. All payments must be in the form of **cash or money order** (***no personal checks***). If you would like to pay more to get your case prepared and filed faster, please do so.

_____ Driver's License (or State issued I.D. card)

_____ Social Security Card

_____ Proof of income for the last month.

_____ Most recently filed Federal and State Tax Returns

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STATEMENT OF FINANCIAL AFFAIRS

Attach additional sheets if necessary.

	Debtor	Debtor's wife
<p>1. Gross income from <u>job</u></p> <p><u>What is your total year-to-date (YTD) gross income?</u> i.e. How much have you made so far this year? On your pay stub, this is the <i>Total YTD Gross Income</i>. If you have more than one job you must add all of the YTD amounts together. <u>If you operated a business</u> in addition to working for a company, you must list the total gross income from everything.</p> <p><u>What was your total gross income from last year?</u> i.e. How much did you make last year? This can be found on last year's tax return. If you do not have the tax return, use your W-2s. <u>If you operated a business</u> in addition to working for a company, you must list the total gross income from everything.</p> <p><u>What was your total gross income from the year before last year?</u> This can be found on that year's tax return. If you do not have the tax return, use your W-2. <u>If you operated a business</u> in addition to working for a company, you must list the total gross income from everything.</p>	<p align="center">2008 This Year \$ _____</p> <p align="center">2007 Last Year \$ _____</p> <p align="center">2006 Year Before \$ _____</p>	<p align="center">2008 This Year \$ _____</p> <p align="center">2007 Last Year \$ _____</p> <p align="center">2006 Year Before \$ _____</p>
<p>2. <u>Additional income</u> (i.e. <u>Not</u> money from a job or operation of a business which was listed in #1 above.)</p> <p>i.e. Did you receive any money this year or in the 2 previous years from: SSI, disability, pension, retirement, unemployment, AFDC, child support, alimony, etc.?</p> <p>NOTE: Your Tax Return will list <u>some</u> of these amounts after your wages from working are listed.</p> <p>**If you have more than one source please itemize**</p> <p align="center"><i><u>Please review your Tax Return to make sure the numbers you put in #1 and #2 are accurate.</u></i></p>	<p align="center">2008 This Year \$ _____</p> <p align="center">2007 Last Year \$ _____</p> <p align="center">2006 Year Before \$ _____</p> <p>From: <input type="checkbox"/> Social Security <input type="checkbox"/> SSI <input type="checkbox"/> unemployment <input type="checkbox"/> AFDC or other Government Aid <input type="checkbox"/> child support <input type="checkbox"/> disability <input type="checkbox"/> pension / retirement <input type="checkbox"/> other _____ <input type="checkbox"/> other _____ <input type="checkbox"/> other _____</p>	<p align="center">2008 This Year \$ _____</p> <p align="center">2007 Last Year \$ _____</p> <p align="center">2006 Year Before \$ _____</p> <p>From: <input type="checkbox"/> Social Security <input type="checkbox"/> SSI <input type="checkbox"/> unemployment <input type="checkbox"/> AFDC or other Gov. Aid <input type="checkbox"/> child support <input type="checkbox"/> disability <input type="checkbox"/> pension / retirement <input type="checkbox"/> other _____ <input type="checkbox"/> other _____ <input type="checkbox"/> other _____</p>
<p>3a. In the last 3 months, have you made payments to any creditor that total more than \$600? (<u>Don't</u> include mortgage/rent or autos)</p> <p>No _____</p> <p>Yes _____ How much in total: \$ _____ Paid to: _____</p> <p>Address: _____ Payment date: _____ Still owe: \$ _____</p>		
<p>3b. In the four years, have you repaid money to family or friends that was borrowed?</p>	<p>Yes _____ How much in total: \$ _____</p> <p>Paid to: _____</p> <p>Address: _____</p> <p>Relationship to you: _____</p> <p>Payment date: _____ Still owe: \$ _____</p>	<p>No _____</p>

<p>4a. In the last year, have you been a party to a lawsuit? i.e. Have you been sued or have you sued anyone?</p> <p>Please send me a copy of the <u>Summons</u>, <u>Original Petition</u>, <u>Judgment</u>, <u>Notice of Garnishment</u> or anything else you have from the court.</p> <p>****Use additional sheets if necessary.****</p>	<p>Yes _____ State name of all parties: _____ vs. _____ Court: _____ Case No. _____ Reason for suit: _____ Status: <u> </u> pending; <u> </u> won; <u> </u> lost</p>	<p>No _____</p>
<p>4b. Has any property or money been seized, attached or garnished in the <u>last year</u>?</p> <p>NOTE – This is <u>not</u> how much you owe them. It’s how much they have actually taken so far and when they took it.</p>	<p>Yes _____ How much in total: \$ _____ From: Paycheck <u> </u>; Bank account _____ Garnishment date(s) _____ Creditor’s name: _____ Address: _____ Is your check being garnished by this creditor now? _____</p>	<p>No _____</p>
<p>5. Has any property been repossessed, sold at a foreclosure or Voluntarily returned to the creditor in the last year? **What was the value of the property when taken / sold? \$ _____</p>	<p>Yes _____ When? _____ What was it? _____ Who took it? _____ Address: _____</p>	<p>No _____</p>
<p>6a. Has any property been assigned for the benefit of a creditor in the last 4 months or been held by a court or other party in the last year? Terms of assignment: _____</p>	<p>Yes _____ What was it? _____ Date: _____ Who has it now? _____ Address: _____</p>	<p>No _____</p>
<p>6b. In the last 12 months, has any of your property been held the Court, Custodian or Receiver?</p>	<p>Yes _____ What was it? _____ Date: _____ Who has it now? _____ Address: _____</p>	<p>No _____</p>
<p>7. Have you made <u>gifts</u> or <u>charitable contributions</u> in the <u>last year</u>?</p> <p>Examples: Family members Friends Church United Way Salvation Army</p> <p>(Answer NO if the total of all gifts to a family member is less than \$200 or if the total given to each church or charity is less than \$100)</p>	<p>Yes _____ When? _____ Was it money? <u> </u> How much? \$ _____ Describe anything else: _____ _____</p> <p>How much was it worth? \$ _____ Name of who you gave it to: _____ _____</p>	<p>No _____</p>

<p>8. Have you had losses in the last year? Examples: fire, theft, gambling, burglary</p>	<p>Yes ___ Date _____ ; Value \$ _____ Fire ___ Theft ___ Gambling ___ Burglary ___ Description: _____ _____ _____ Did you have insurance? _____ How much did insurance pay? \$ _____</p>	<p>No ___</p>
<p>9. Have you paid <u>anyone other</u> than Tracy A. Brown for advice on bankruptcy or consolidating your bills?</p>	<p>Yes ___ How much in total? \$ _____ Paid to: _____ When? _____ Yes ___ How much in total? \$ _____ Paid to: _____ When? _____</p>	<p>No ___</p>
<p>10. Have you <u>sold</u> or <u>given away</u> any property in the last four years? (this includes garage sales & items sold at a flea market) Have you signed any <u>Quit Claim Deeds</u> on any real estate in the last 2 years? _____ If your answer is “yes”, provide the details.</p>	<p>Yes ___ Date: _____ \$ _____ received: _____ Description: _____ Sold/given to: _____ Address: _____</p>	<p>No ___</p>
<p>11. Have you closed any bank or other financial accounts in the last year? Bank Name: _____ City & State _____</p>	<p>Yes ___ When? _____ Final balance \$ _____ Account Type: Checking _____ Savings _____</p>	<p>No ___</p>
<p>12. Do you have a safe deposit box? Bank Name: _____ City & State _____ Name of other(s) with access to the box? _____</p>	<p>Yes ___ Describe contents: _____ _____ _____</p>	<p>No ___</p>
<p>13. Have there been any setoffs by a creditor/bank in the last 3 months (money from one account taken to pay another)</p>	<p>Yes ___ How much in total? \$ _____ Creditor: _____ Address _____ Date _____</p>	<p>No ___</p>
<p>14. Are you holding property that belongs to another person? Relationship of person to you: father ____, mother ____, describe other: _____</p>	<p>Yes ___ Owner: _____ Address: _____ Describe: _____ Estimated Value \$ _____</p>	<p>No ___</p>
<p>15. Have you moved in the last 2 years? <u>Don't</u> list your <u>current</u> address. Give complete address & move in & move out dates. Use additional paper if more than two.</p>	<p>Yes ___ Address _____ _____ Dates moved : in _____ / out _____ Address _____ _____ Dates moved : in _____ / out _____</p>	<p>No ___</p>

16. Spouses and Former Spouses – Did you live in a community property state within the last 6 years? If yes, identify the name of your current spouse and the name of your former spouse if that person lived with you in the community property state. Community property states include: Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington & Wisconsin.	Yes _____ State _____ Name of current Spouse who lived with me _____ Name of former Spouse who lived with me	No __
17. Environmental Issues – Do you own any property that has any hazardous waste on it or have you been notified by the government that you may be potentially liable under or in violation of an Environmental Law?	Yes _____ Please complete the Environmental Information below.	No __
18. You must complete additional questions 18 through 25 if <u>any</u> of the following applies: a) You currently own or operate a business b) You owned or operated a business in the past 6 years c) You were an officer of any business d) You had more than a 5% interest in any business	NOTE: If you need the additional attachment for questions 18 through 25 and did not receive it at the consultation, please call the office and request it.	

If you answered “Yes” to question 17 above, please read and complete the following. For the purpose of this question, the following definitions apply: “Environmental Law” means any federal, state, or local statute or regulation regulating pollution, contamination, releases of hazardous or toxic substances, wastes or material into the air, land, soil, surface water, groundwater, or other medium, including, but not limited to, statutes or regulations regulating the cleanup of these substances, wastes, or material. “Site” means any location, facility, or property as defined under any Environmental Law, whether or not presently or formerly owned or operated by the Debtor, including but not limited to, disposal sites. “Hazardous Material” means anything defined as a hazardous waste, hazardous substance, toxic substance, hazardous material, pollutant, or contaminant or similar term under an Environmental Law.

NOTE: If you have more than one site, please use additional pages to answer all questions for each site.

- a. List the name and address of every site for which the Debtor has received notice by a governmental unit that it may be liable or potentially liable under or in violation of an Environmental Law.

SITE NAME AND ADDRESS	NAME AND ADDRESS OF GOVERNMENTAL UNIT	DATE OF NOTICE	ENVIRONMENTAL LAW

- b. List the name and address of every site for which the Debtor provided notice to a governmental unit of a release of Hazardous Material.

SITE NAME AND ADDRESS	NAME AND ADDRESS OF GOVERNMENTAL UNIT	DATE OF NOTICE	ENVIRONMENTAL LAW

- c. List all judicial or administrative proceedings, including settlements or orders, under any Environmental with respect to which the Debtor is or was a party.

NAME AND ADDRESS OF GOVERNMENTAL UNIT	DOCKET NUMBER	STATUS OF DISPOSITION

Monthly Expenses:

Please list the amount you spend each month for each category.

Expenses	Debtor	Spouse (only if separate)
(circle one) Rent - Mortgage - Lot rental – Pad Fee	\$ Taxes / Insurance included? Y N	\$ Taxes / Insurance included? Y N
Electricity & Gas (give average amount)	\$	\$
Water & Sewer	\$	\$
Telephone	\$	\$
Cable	\$	\$
Alarm System	\$	\$
Home maintenance (repairs & upkeep)	\$	\$
Food (home, work and eating out)	\$	\$
Clothes (include coats, boots, winter/summer items)	\$	\$
Laundry & Dry cleaning	\$	\$
Medical & Dental expenses	\$	\$
Transportation (gas, bus, Metrolink, taxi, etc)	\$	\$
Recreation	\$	\$
Charitable contributions	\$	\$
Homeowner's/Renter's Insurance (if not listed above)	\$	\$
Life Insurance (if you pay directly)	\$	\$
Health Insurance (if you pay directly)	\$	\$
Auto Insurance	\$	\$
Auto payments 1. 2. 3. 4.	\$	\$
Alimony payments	\$	\$
Child care	\$	\$
Other expenses (hair care, barber shop, etc): _____	\$	\$
Other:	\$	\$
Other:	\$	\$
Other:	\$	\$

What is the amount of your bill each year for:

1. **Real Estate Taxes** \$ _____
2. **Personal Property Taxes** \$ _____