The Belsky Law Firm

Chapter 13 Bankruptcy Intake Form

Send to the Firm

Save a Copy

Complete The Applicable Fields. Attach Additional Pages If More Space Is Needed.

General Information

Today's Date

Are You Married?

Have You Filed Bankruptcy Before? If So, When?

Prior Bankruptcy Case / District (If Known)

Debtor: First, Middle And Last Name

Spouse: First, Middle And Last Name

Debtor Social Security Number

Spouse Social Security Number

Debtor Date Of Birth

Spouse Date Of Birth

Home Phone

Debtor Work Phone

Spouse Work Phone

Debtor Cell Phone

Spouse Cell Phone

Debtor Email

Spouse Email

Household Size (Number Of People)

Residential Address: Street, City, County And ZIP

Save a Copy

Save first, then send your saved PDF.
Browser delivery: belskybankruptcy.com/client-intake/

Send to the Firm

Save buttons: open in Adobe Acrobat Reader. In a browser, use Download / Save with changes.

General Information (Continued)

Mailing Address, If Different: Street, City, County And ZIP

Have You Lived At This Address For The Past 3 Years?

☐ Yes ☐ No

Prior Address 1 And Dates In / Out (If Less Than 3 Years At Current Address)

Prior Address 2 And Dates In / Out (If Less Than 3 Years At Current Address)

Prior Address 3 And Dates In / Out (If Less Than 3 Years At Current Address)

Have You Lived In This State For The Last 2 Years?

☐ Yes ☐ No

If No, Prior State

When Did You Move To Maryland?

Do You Owe Child Support Or Alimony?

☐ Yes ☐ No

Monthly Support Obligation ($)

Person Receiving Support: Name And Address

General Information (Continued)

Are You Current On Support?

☐ Yes ☐ No

If No, How Much Are You Behind? ($)

Are You Expecting Any Inheritances Or Lawsuit Settlements?

☐ Yes ☐ No

If Yes, Explain The Inheritance Or Lawsuit Settlement

Does Anyone Owe You More Than $1,000?

☐ Yes ☐ No

If Yes, Explain Who Owes You Money, How Much And The Details

Real Property: Homes, Buildings And Land

Property 1: Street Address

Property 1: Type: Single Family, Rowhome, Townhome, Condo, Duplex, Building Or Land

Property 1: Purchase Price ($)

Property 1: Year Purchased

Property 1: Number Of Mortgages

Property 1: First Mortgage - Mortgage Company

Real Property: Homes, Buildings And Land (Continued)

Property 1: First Mortgage - Monthly Payment ($)

Property 1: First Mortgage - Payment Due Date

Property 1: First Mortgage - Total Owed ($)

Property 1: First Mortgage - Months Behind

Property 1: First Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 1: Second Mortgage - Mortgage Company

Property 1: Second Mortgage - Monthly Payment ($)

Property 1: Second Mortgage - Payment Due Date

Property 1: Second Mortgage - Total Owed ($)

Property 1: Second Mortgage - Months Behind

Property 1: Second Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 1: Additional Mortgages / HOA: Describe

Property 1: Do You Wish To Keep This Property?

☐ Yes ☐ No

Property 1: All Names On The Deed

Property 2: Street Address

Real Property: Homes, Buildings And Land (Continued)

Property 2: Type: Single Family, Rowhome, Townhome, Condo, Duplex, Building Or Land

Property 2: Purchase Price ($)

Property 2: Year Purchased

Property 2: Number Of Mortgages

Property 2: First Mortgage - Mortgage Company

Property 2: First Mortgage - Monthly Payment ($)

Property 2: First Mortgage - Payment Due Date

Property 2: First Mortgage - Total Owed ($)

Property 2: First Mortgage - Months Behind

Property 2: First Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 2: Second Mortgage - Mortgage Company

Property 2: Second Mortgage - Monthly Payment ($)

Property 2: Second Mortgage - Payment Due Date

Property 2: Second Mortgage - Total Owed ($)

Property 2: Second Mortgage - Months Behind

Property 2: Second Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 2: Additional Mortgages / HOA: Describe

Property 2: Do You Wish To Keep This Property?

☐ Yes ☐ No

Real Property: Homes, Buildings And Land (Continued)

Property 2: All Names On The Deed

Property 3: Street Address

Property 3: Type: Single Family, Rowhome, Townhome, Condo, Duplex, Building Or Land

Property 3: Purchase Price ($)

Property 3: Year Purchased

Property 3: Number Of Mortgages

Property 3: First Mortgage - Mortgage Company

Property 3: First Mortgage - Monthly Payment ($)

Property 3: First Mortgage - Payment Due Date

Property 3: First Mortgage - Total Owed ($)

Property 3: First Mortgage - Months Behind

Property 3: First Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 3: Second Mortgage - Mortgage Company

Property 3: Second Mortgage - Monthly Payment ($)

Property 3: Second Mortgage - Payment Due Date

Property 3: Second Mortgage - Total Owed ($)

Property 3: Second Mortgage - Months Behind

Real Property: Homes, Buildings And Land (Continued)

Property 3: Second Mortgage - Are Taxes And Insurance Included In Escrow?

☐ Yes ☐ No

Property 3: Additional Mortgages / HOA: Describe

Property 3: Do You Wish To Keep This Property?

☐ Yes ☐ No

Property 3: All Names On The Deed

Have You Owned Any Other Real Property In The Last 3 Years?

☐ Yes ☐ No

If Yes, Explain The Address And Disposition

Personal Property And Financial Accounts

Do You Have Cash On Hand?

☐ Yes ☐ No

Typical Cash Carried ($)

Bank 1: Name And Location

Bank 1: Current Account Balance ($)

Bank 1: Type: Checking, Savings Or Both

Bank 1: Additional Names On The Account

Personal Property And Financial Accounts (Continued)

Bank 2: Name And Location

Bank 2: Current Account Balance ($)

Bank 2: Type: Checking, Savings Or Both

Bank 2: Additional Names On The Account

Bank 3: Name And Location

Bank 3: Current Account Balance ($)

Bank 3: Type: Checking, Savings Or Both

Bank 3: Additional Names On The Account

Do You Have Any Security Deposits (Rent, BGE, Etc.)?

☐ Yes ☐ No

Security Deposits: Holder And Amount

Do You Own Any Life Insurance Policies?

☐ Yes ☐ No

Policy Type: Term, Universal Or Whole Life

Cash Surrender Value (Whole Life Only) ($)

Do You Have Any Pensions Or Retirement Accounts?

☐ Yes ☐ No

Personal Property And Financial Accounts (Continued)

Retirement Account 1: Type: 401(k), 403(b), IRA, Government Or TSP

Retirement Account 1: Approximate Value ($)

Retirement Account 1: Whose Name Is On The Account?

Retirement Account 2: Type: 401(k), 403(b), IRA, Government Or TSP

Retirement Account 2: Approximate Value ($)

Retirement Account 2: Whose Name Is On The Account?

Do You Own Any Bonds Or Stock?

☐ Yes ☐ No

List Bonds / Stock And Current Market Value

Will You Receive, Or Did You Receive, A Refund For The Last Tax Year?

☐ Yes ☐ No

State Tax Refund ($)

Federal Tax Refund ($)

Are You Currently Or Recently Involved In Any Lawsuits / Claims?

☐ Yes ☐ No

Date Of Injury / Claim

Attorney Handling The Matter And Contact Information

Brief Description Of The Lawsuit / Claim

Business Ownership And Household Property

Do You Own A Business Or Are You Self-Employed?

☐ Yes ☐ No

Business Name And Address

Is The Business Incorporated?

☐ Yes ☐ No

Business Inception Date

Business End Date (If Any)

Current / Former Partners And Addresses

Type Of Business: Brief Description

Estimated Household Property Value ($): Televisions

Estimated Household Property Value ($): Stereo

Estimated Household Property Value ($): Computer

Estimated Household Property Value ($): Microwave

Estimated Household Property Value ($): Lamps

Estimated Household Property Value ($): Sofas

Estimated Household Property Value ($): Beds

Estimated Household Property Value ($): Tables

Estimated Household Property Value ($): Chairs

Estimated Household Property Value ($): Suits

Estimated Household Property Value ($): Dresses

Business Ownership And Household Property (Continued)

Estimated Household Property Value ($): Shirts

Estimated Household Property Value ($): Pants

Estimated Household Property Value ($): Shoes

Estimated Household Property Value ($): Other: Collectibles, Jewelry, Rugs, Coins, Stamps, Antiques, Etc.

Motor Vehicles: Cars, Boats, ATVs And Other Vehicles

Vehicle 1: Year / Make / Model

Vehicle 1: Mileage

Vehicle 1: Car Loan Company

Vehicle 1: Monthly Payment ($)

Vehicle 1: Payment Due Date

Vehicle 1: Total Owed ($)

Vehicle 1: Months Behind

Vehicle 1: Titled Owner

Vehicle 1: Do You Wish To Keep This Vehicle?

☐ Yes ☐ No

Vehicle 2: Year / Make / Model

Vehicle 2: Mileage

Vehicle 2: Car Loan Company

Vehicle 2: Monthly Payment ($)

Motor Vehicles: Cars, Boats, ATVs And Other Vehicles (Continued)

Vehicle 2: Payment Due Date

Vehicle 2: Total Owed ($)

Vehicle 2: Months Behind

Vehicle 2: Titled Owner

Vehicle 2: Do You Wish To Keep This Vehicle?

☐ Yes ☐ No

Vehicle 3: Year / Make / Model

Vehicle 3: Mileage

Vehicle 3: Car Loan Company

Vehicle 3: Monthly Payment ($)

Vehicle 3: Payment Due Date

Vehicle 3: Total Owed ($)

Vehicle 3: Months Behind

Vehicle 3: Titled Owner

Vehicle 3: Do You Wish To Keep This Vehicle?

☐ Yes ☐ No

Vehicle 4: Year / Make / Model

Vehicle 4: Mileage

Vehicle 4: Car Loan Company

Vehicle 4: Monthly Payment ($)

Motor Vehicles: Cars, Boats, ATVs And Other Vehicles (Continued)

Vehicle 4: Payment Due Date

Vehicle 4: Total Owed ($)

Vehicle 4: Months Behind

Vehicle 4: Titled Owner

Vehicle 4: Do You Wish To Keep This Vehicle?

☐ Yes ☐ No

Additional Vehicles / Sports Vehicles: Boats, ATVs, Jet Skis, Scooters

Have You Owned Any Other Vehicles In The Last 3 Years That Are No Longer In Your Possession?

☐ Yes ☐ No

If Yes, What Happened? Sold, Repossessed, Transferred, Etc.

Priority Taxes And Credit Union Loans

Do You Owe Income Taxes?

☐ Yes ☐ No

Tax Years Owed

IRS Taxes Owed ($)

Maryland Taxes Owed ($)

Priority Taxes And Credit Union Loans (Continued)

Do You Have Loans With SECU, MECU Or Another Credit Union?

☐ Yes ☐ No

Name Of Bank / Credit Union

Are There Co-Signers On The Loan?

☐ Yes ☐ No

If Yes, List Their Names And Addresses

Current Income And Employment

Marital Status: Single, Married, Separated, Divorced Or Widowed

Household Year-To-Date Gross Income ($)

Debtor: Employer

Spouse: Employer

Debtor: Occupation

Spouse: Occupation

Debtor: Employer Address

Spouse: Employer Address

Debtor: Employer Phone

Spouse: Employer Phone

Debtor: Payroll Fax

Spouse: Payroll Fax

Current Income And Employment (Continued)

Debtor: Length Of Employment

Spouse: Length Of Employment

Debtor: Take-Home Pay ($)

Spouse: Take-Home Pay ($)

Debtor: Paid Biweekly, Weekly Or Monthly?

Spouse: Paid Biweekly, Weekly Or Monthly?

Are There Other Income Sources In The Household?

☐ Yes ☐ No

List Other Income Types And Monthly Amounts

Lawsuits And Judgments Against You

Is Anyone Suing You, Or Have Any Judgments Been Entered Against You?

☐ Yes ☐ No

Case 1: Court / Case Name / Case Number

Case 2: Court / Case Name / Case Number

Case 3: Court / Case Name / Case Number

Case 4: Court / Case Name / Case Number

Dependents

Dependent 1: Relationship To You

Dependent 1: Age

Dependent 1: Does This Dependent Live With You?

☐ Yes ☐ No

Dependent 2: Relationship To You

Dependent 2: Age

Dependent 2: Does This Dependent Live With You?

☐ Yes ☐ No

Dependent 3: Relationship To You

Dependent 3: Age

Dependent 3: Does This Dependent Live With You?

☐ Yes ☐ No

Dependent 4: Relationship To You

Dependent 4: Age

Dependent 4: Does This Dependent Live With You?

☐ Yes ☐ No

Monthly Household Expenses

Rent Or Mortgage Payment ($ / Month)

Property Taxes (If Not Escrowed) ($ / Month)

Property Insurance (If Not Escrowed) ($ / Month)

Electricity Heating ($ / Month)

Water Sewage ($ / Month)

Telephone Service ($ / Month)

Monthly Household Expenses (Continued)

Other Utilities (List) ($ / Month)

Cell Phone ($ / Month)

Cable Internet ($ / Month)

Home Maintenance ($ / Month)

Food ($ / Month)

Clothing ($ / Month)

Laundry Dry Cleaning ($ / Month)

Medical Dental ($ / Month)

Transportation (Not Car Payments) ($ / Month)

Entertainment Recreation ($ / Month)

Charitable Contributions ($ / Month)

Auto Insurance ($ / Month)

Taxes (Not Payroll) ($ / Month)

Car Payments ($ / Month)

Alimony Child Support Family Maintenance ($ / Month)

Support For Dependents Not Living At Home ($ / Month)

Business Operation Expenses ($ / Month)

Mandatory Payroll Deductions ($ / Month)

Court-Ordered Payments ($ / Month)

Education (To Maintain Employment) ($ / Month)

Childcare ($ / Month)

Education Expense For Child Under 18 ($ / Month)

Monthly Household Expenses (Continued)

Care For Elderly Ill Disabled Family Member ($ / Month)

Health Savings Account ($ / Month)

Disability Insurance ($ / Month)

Non-Mandatory Contributions (E.G., Retirement) ($ / Month)

Other Expenses Not Listed ($ / Month)

Additional Notes

Notes / Explanations

Signatures

Debtor Signature (Type Name To Sign)

Debtor Signature Date

Spouse Signature (If Joint; Type Name To Sign)

Spouse Signature Date