

CHAPTER 13 CHECKLIST

1. Certificate of Credit Counseling: www.consumerbankruptcy counseling.info
2. **Signed Copies** of Federal Income Tax Returns for 2011 2012, 2013 & 2014
3. Seven months worth Proof of Income (paycheck stubs, award letters, bank statements, etc.)
4. Credit Report (www.annualcreditreport.com)
5. For any rental property, provide a list of rents by month along with detailed expenses & copies of any rental agreements
6. **Most Recent** copies of any and all statements for your vehicles and home loan.
7. For all retirement loans, provide a copy of the loan document showing the payments, number of months remaining and balance due
8. Court order for all court ordered payments (i.e. child support, spousal support, etc)
9. Copy of all deeds on real property in which the debtor(s) has an interest
10. A Copy of all trusts in which the debtor(s) is a beneficiary
11. Photo ID (driver's license) and Original Social Security Card
12. Wage Order Information Sheet
13. Copies of vehicle registration for all vehicles you own or have co- signed
14. Business Questionnaire (only if debtor owns a business)

730 21st Street
Bakersfield, CA 93301

WAGE ORDER INFORMATION SHEET

1. Name of Debtor(s): _____ Phone No.: _____
2. Name & SSN of Debtor Requesting Payroll Deduction: _____
3. Case # _____ Attorney: _____
4. Employer Name: _____
Employer Address: _____
City, State, Zip: _____
Phone No.: _____ Fax No.: _____
5. Do your paychecks come from a different address? (___) Yes (___) No. If yes, please provide the Payroll Mailing Address:

Phone No.: _____ Fax No.: _____
6. Does a specific person handle this transaction? If so, please specify (ex: Attn: Payroll Dept.) _____
7. Employee I.D. #: _____

Acknowledged _____ Date _____
Debtor's Signature

The Wage Order will be processed based on the information you provide. Please be sure that all information is accurate. Errors may cause a delay in deductions. **It is your responsibility to see that all payments are made to the office of the Chapter 13 Trustee prior to the Wage Order going into effect.** You must make sure your employer has started your wage deductions before you stop making direct payments to the Chapter 13 Trustee.

CLASS 1 CHECKLIST

FILE WITH TRUSTEE ONLY **DO NOT FILE WITH THE COURT**

Debtor Name (s): _____ BK Case #: _____

Property Address: _____

- ☐ Residence
☐ Rental
☐ Other Describe: _____

Daytime Phone: () _____ Evening: () _____

Attorney name: (if any) _____

THE FOLLOWING INFORMATION MUST BE COMPLETED ON ALL CLAIMS LISTED IN CLASS 1. PLEASE BE SURE TO COMPLETE THIS FORM TO THE BEST OF YOUR ABILITY AND ATTACH THE PAYMENT COUPON OR STATEMENT THAT WAS SUPPLIED TO YOU FROM EACH CREDITOR.

Creditor Name: _____

Account #: _____

Payment Address: _____

Street Address

City State Zip

Creditor Phone Number: (if known) _____

Regular Monthly Payment Amount: \$ _____ Current Interest Rate: _____

Monthly Payment Due Date: _____

Date Payment Late: _____ Monthly Late Charge Amount: \$ _____

Is this a variable interest rate loan? € Yes No

If yes, when is the next anticipated adjustment date? _____

Are property taxes included in the monthly payment? € Yes No

Is insurance included in the monthly payment? € Yes No

Is the loan due in full and payable in less than 5 years? € Yes No

If yes, date due: _____

**AUTHORIZATION TO RELEASE INFORMATION
TO THE TRUSTEE REGARDING SECURED CLAIMS
BEING PAID BY THE TRUSTEE**

**FILE WITH TRUSTEE ONLY
DO NOT FILE WITH THE COURT**

Debtor Name(s): _____ Bk Case #: _____

The debtor(s) in the above captioned bankruptcy case do hereby authorize any and all lien holder(s) on real and personal property of the bankruptcy estate to release information to the standing Trustee (as indicated below) in this bankruptcy filing.

The information to be released includes but is not limited to the amount of the post-petition monthly installment, the annual interest rate and its type, the loan balance, impound accounts, amount of the contractual late charge and the mailing address for payments. This information will only be used by the Trustee and his staff in the administration of the bankruptcy estate and may be included in motions before the Court.

Date: _____
Debtor's Signature

Date: _____
Joint Debtor's Signature

Standing Trustee (check one):

- ☐ Jan Johnson
- ☐ Larry Loheit
- ☐ Russell Greer
- ☐ Michael Meyer

(7/1/03

LAW OFFICES OF NEIL E. SCHWARTZ

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MICHAEL MEYER

CHAPTER 13 TRUSTEE

P.O. BOX 28950

FRESNO, CA 93729-8950

(559) 275-9512

(559) 275-9518 Fax

NAME: _____

CASE NUMBER: _____

HOME PHONE NUMBER: () _____

MR. CELL NUMBER: () _____

MRS. CELL NUMBER: () _____

MR. EMPLOYER:

NAME OF COMPANY: _____

JOB TITLE: _____

PAYROLL MAILING ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP:** _____

PAYROLL PHONE NUMBER: ** () _____

PAYROLL FAX NUMBER: ** () _____

MRS. EMPLOYER:

NAME OF COMPANY: _____

JOB TITLE: _____

PAYROLL MAILING ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP:** _____

PAYROLL PHONE NUMBER: ** () _____

PAYROLL FAX NUMBER: ** () _____