

STEIER & McCORMICK, LLC

ATTORNEYS AT LAW
www.ct-law.net

970 Farmington Avenue
Suite 205
West Hartford, CT 06107
Telephone: (860) 233-1271
Fax: (860) 232-3789

Mark S. Steier
Christopher H. McCormick
William J. Severni
Robert S. Carey, Jr.

139 Simsbury Road
1st Floor
Avon, CT 06001
Telephone: (860) 677-6277
Fax: (860) 677-8831

DOCUMENTS REQUIRED SO THAT WE CAN REPRESENT YOU IN THE PREPARATION OF YOUR PETITION AND REPRESENT YOU IN THE MEETING WITH CREDITORS

_____ Tax returns (federal and state) for the past 2 years (if filed, if not, then a copy of any extension form). If you have not filed a tax return, then a copy of the last tax return filed. Also, W-2; 1099 and any statement of income from whatever source. Past 2 years.

_____ Mortgage statements.

_____ Tax transcript.

_____ Corporate tax returns (income, sales, and labor department returns).

_____ Household Budget.

_____ Business Budget.

_____ Business Projections.

_____ Retirement Plans (Summary Plan Descriptions) and statements of amount of benefits along with statements reflecting contributions within past 2 years.

_____ All Past Due Bills (the past 6 months would be helpful, for example utility bills, even if current payments)

_____ Paystubs and Statement of Income for whatever source (for example Social Security, child support, pension or Unemployment Compensation for the past 6 months).

_____ Household bills (for the past 6 months-for example, telephone and electric). Include any secured merchandise (for example furniture purchased on credit).

_____ Copies of Life Insurance Policies.

_____ Copies of Homeowner's Insurance Policies (including any riders).

STEIER & McCORMICK, LLC

ATTORNEYS AT LAW

www.ct-law.net

970 Farmington Avenue
Suite 205
West Hartford, CT 06107
Telephone: (860) 233-1271
Fax: (860) 232-3789

Mark S. Steier
Christopher H. McCormick
William J. Severni
Robert S. Carey, Jr.

139 Simsbury Road
1st Floor
Avon, CT 06001
Telephone: (860) 677-6277
Fax: (860) 677-8831

- _____ Copies of bank statements for the past 12 months.
- _____ Copy of any lawsuits (either that you have brought or where you are being sued).
- _____ Divorce Agreement or Judgment (if divorced within the past 10 years) also Separation Agreements.
- _____ Present address of former spouse and children for whom paying child support or receiving state of local public assistance.
- _____ Copy of Deed to Debtor's Home.
- _____ List of all properties purchased and sold within the past 10 years.
- _____ Closing files for any properties sold within past 10 years.
- _____ Signed retainer agreement
- _____ Signed authorization to obtain information from Client to permit Attorney to obtain all records.
- _____ Statement under oath that the documents being provided to the attorney are true and correct under the penalties of perjury.
- _____ Photo's of Driver's License.
- _____ Signed Consultation Agreement.
- _____ Certificate of completion of Credit Counseling Course within the past 180 days.
- _____ Credit Reports (all three bureaus)
- _____ Public Lawsuit Search
- _____ Contents of home (by room) with dates of purchase or merchandise (and condition). Estimate of value. Please look at instructions to help you in valuing the contents of your home.

STEIER & McCORMICK, LLC

ATTORNEYS AT LAW
www.ct-law.net

970 Farmington Avenue
Suite 205
West Hartford, CT 06107
Telephone: (860) 233-1271
Fax: (860) 232-3789

Mark S. Steier
Christopher H. McCormick
William J. Severni
Robert S. Carey, Jr.

139 Simsbury Road
1st Floor
Avon, CT 06001
Telephone: (860) 677-6277
Fax: (860) 677-8831

_____ Information concerning vehicles. Estimate of value. Please look at instructions to help you in valuing.

_____ Copy of motor vehicle purchase contract if the vehicle was purchased within the past 910 days.

_____ Real Estate Title Search.

_____ Photos of any collections.

_____ Trust Documents.

_____ Probate Documents, including inventory, final accounting, wills, name of attorney and representative of estate (i.e. administrator or executor).

_____ Timeshare documents including maintenance obligations.

_____ Personal injury actions or extent of injury even if no claim filed. Also Workmen's Compensation Actions.

_____ Real Estate Market Analysis/Real Estate Appraisal

_____ Other _____

The documents that I am providing to Steier & McCormick, LLC are correct and complete under the penalties of perjury and Steier & McCormick, LLC may rely on these documents in the preparation of my Bankruptcy Case and in all matters involving my bankruptcy case.

Debtor:

Debtor:

Dated:

Dated: