

# LEWIS ADAMS AND ASSOCIATES

ATTORNEY AT LAW

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## Client Checklist - Bankruptcy

For us to complete the documents needed to file your case with the United States Bankruptcy Court, you will need to provide our office with the following items.

- Signed Representation and Fee Agreement
- Completed Questionnaire
- Credit Report release form
- Picture ID, preferably your driver's licence.
- Social Security Number, preferably your Social Security Card
- Credit Counseling Certificate  
*(Reminder: a second, Financial Management Course must be taken after filing.)*
- Read and Sign the "**Information Required to File Bankruptcy**" document
- Last 6 months of bank statements prior to the filing.
- Last 7 months of consecutive pay stubs for each job you have, including any pay or other income information from any other source, INCLUDING A NON-FILING SPOUSE.  
*Pay information will need to be supplemented right up to the date the petition is filed.*
- Last 4 years tax returns for both the IRS and State of Utah (or any other state return) with all W-2 or 1099 information attached, signed in blue ink. *For Chapter 13's, If they have not been filed, they will need to be prepared and we will file them for you.*
- 401(k) Statement. If you have a 401(k) loan, provide a statement showing current REMAINING balance and DATE when loan will be paid.
- IRA, Annuities, Pension Plans, or Life Insurance. Provide a current balance statement.
- Copy of all billing statements, including mortgage statements, collection letters, utility bills, etc. *Provide for the last 2 months and well as all contracts.*
- VEHICLE REGISTRATION for all cars, motorcycles, boats, 4 wheelers, etc. and completed VEHICLE INFORMATION SHEET. Make sure to include the mileage.
- Proof of all charitable contributions paid within one year prior to filing.
- Proof of Daycare expenses. Provide a letter from the provider or receipts.
- Property tax assessment and any recent appraisals for all real property.
- Divorce Decree if divorced within three years
- Any and all court papers you have received including Complaints, Judgments, Garnishment Orders, Liens, etc. *(Garnishments cannot be stopped unless all attorney fee's are paid and all paper documentation requested is provided to our office).*

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- Business questionnaire for each business.
  - Profit and Loss Statement for 6 months prior to filing, including year-to-date (at least six months) profit and expense detail
  - Business tax returns for the last two years, if applicable, both IRS and State.

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- FEES (In the form of cash, money order or cashiers check made payable to Lewis P. Adams, Attorney) *Please, no personal checks. \$500.00 initial fees are due prior to any preparation of your paperwork and are non-refundable. The following are the total fees, which MUST be paid before the case can be filed with the Bankruptcy Court.*

Credit Report Fee: \$ \_\_\_\_\_

Filing Fee: \$ \_\_\_\_\_

Attorney Fee: \$ \_\_\_\_\_

Total due: \$ \_\_\_\_\_