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ATTORNEYS AT LAW

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Client Questionnaire
Section 1 § Basic Information

Part A. Name and Address

Name: _____
Last First Middle

Phone Numbers Home: _____ Work: _____ Cell: _____

Email Address: _____ Date of Birth: _____

Referred By: _____

Have you used any other names in the past eight years? No Yes *If yes, list other names:*

Social Security Number: _____ Drivers' License No: _____

Address: _____

City: _____ State: _____ Zip: _____

If you have a different mailing address, please list:

Mailing address: _____

City: _____ State: _____ Zip: _____

Have you lived at your current address for at least 6 months? No Yes

Have you lived at this address at least 2 years? No Yes

If you answered no to either of the questions above, please list your previous address:

Address: _____

City: _____ State: _____ Zip: _____

Address: _____

City: _____ State: _____ Zip: _____

Part B. Name and Address of Spouse

If you are filing jointly with your spouse, fill in the following information about you spouse:

Name: _____
Last First Middle

Phone Numbers Home: _____ Work: _____ Cell: _____

Email Address: _____ Date of Birth: _____

Have you used any other names in the past eight years? No Yes *If yes, list other names:*

Social Security Number: _____ Driver' License No.: _____

Address (if different from spouse): _____

City: _____ State: _____ Zip: _____

If you have a different mailing address, please list:

Mailing Address (if different from spouse): _____

City: _____ State: _____ Zip: _____

Have you lived at your current address for at least 6 months? No Yes

Have you lived at this address for at least 2 years? No Yes

If you answered no to either of the questions above, please list your previous address:

Address: _____

City: _____ State: _____ Zip: _____

Address: _____

City: _____ State: _____ Zip: _____

Part C. Household Size/Dependents

How many people live with you? Adults _____ Children _____

Do you pay child support for any children not residing at your home? Circle One: Y or N

Part D. Prior/Pending Bankruptcy Cases

Has a bankruptcy case been filed by you or your spouse in the last 8 years? No Yes

If yes, in which district of which state was the case filed? _____

Case Number: _____ Date filed: _____

Part E. Taxes

If tax debts are one of the primary reasons you are coming to see us and you have transcripts of your taxes or any other documentation sent to you by the IRS or State, please bring it with you to your appointment.

Please fill in information on taxes you currently owe to the IRS, Oregon Department of Revenue, TriMet, County Business or others.

Taxes Owed to:	Year:	Amount:
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
Property Taxes:	_____	\$ _____
Property Address:	_____	

Section 2 Property

Part A. Real Estate

List all real estate which you own or are a joint owner of, even if you still owe money on the property.

Street Address City, State, Zip	Value	Amount owed to mortgages, liens, loans, lines of credit etc.
1. _____ _____	\$ _____	\$ _____
2. _____ _____	\$ _____	\$ _____
3. _____ _____	\$ _____	\$ _____

Have you sold any real estate in the past four years? If yes, please provide the address of the property, when it was sold, to whom, how much received, where proceeds spent: _____

Part B. Personal Property

For each type of property listed below, indicate whether you own any property of that category, and, if you do, fill in the requested information. When determining value, use garage sale or liquidated value. How much would you receive for this property at a garage sale? For property acquired for personal or family use, liquidated value is the price a retail merchant would charge for a property of that kind, considering the age and condition of that property.

1. Cash on hand: (Money in your pocket)	\$ _____
2. Checking Accounts (Please list bank name): (Do you have any loans with your current bank? - Circle One: Y or N)	\$ _____
_____	\$ _____
_____	\$ _____
3. Saving Accounts (Please list bank name):	\$ _____
_____	\$ _____
_____	\$ _____

3. Security deposits held by utility companies, landlord: \$ _____
4. Household goods, furniture, including audio, video, and computer equipment: \$ _____
5. Books, pictures, art objects, records, compact discs and collectibles: \$ _____
6. Clothing: \$ _____
7. Furs and jewelry: \$ _____
8. Sports, photographic, hobby equipment, firearms: \$ _____
9. Interest in insurance policies-specify refund or cancellation value: \$ _____
10. Annuities: \$ _____
11. Interests in an education IRA: \$ _____
12. Interests in pension or profit sharing plans (401k, 403B, etc.): \$ _____
13. Stock and interests in business: \$ _____
14. Interests in partnerships/joint ventures: \$ _____
15. Bonds: \$ _____
16. Accounts receivable: \$ _____
17. Alimony/family support to which you are entitled: \$ _____
18. Other liquidated debts owed to you, including tax refunds: \$ _____
19. Equitable or future interests or life estates: \$ _____
20. Interests in estate of decedent or life insurance plan or trust: \$ _____
21. Other contingent / unliquidated claims, including tax refunds, counterclaims, Personal injury claims or workers compensation claims: \$ _____
22. Patents, copyrights, other intellectual property: \$ _____
23. Licenses, franchises: \$ _____
24. Customer list or other compilation: \$ _____
25. Aircraft and accessories: \$ _____
26. Office equipment, supplies: \$ _____
27. Machinery, fixtures etc. for business: \$ _____
28. Inventory: \$ _____

- 29. Animals: \$ _____
- 30. Crops-growing or harvested: \$ _____
- 31. Farming equipment and implements: \$ _____
- 32. Farm supplies, chemicals, feed: \$ _____
- 33. Other personal property of any kind not listed: \$ _____
- 34. Do you have claims you can assert against anyone else? Please discuss with the attorney.

Vehicles:

Automobiles, trucks, trailers, boats, recreational vehicles and accessories:

- 1) Vehicle year make and model: _____
 Miles: _____ Value: \$ _____
 Amount owed on vehicle: \$ _____
- 2) Vehicle year make and model: _____
 Miles: _____ Value: \$ _____
 Amount owed on vehicle: \$ _____
- 3) Vehicle year make and model: _____
 Miles: _____ Value: \$ _____
 Amount owed on vehicle: \$ _____
- 4) Vehicle year make and model: _____
 Miles: _____ Value: \$ _____
 Amount owed on vehicle: \$ _____
- 5) Vehicle year make and model: _____
 Miles: _____ Value: \$ _____
 Amount owed on vehicle: \$ _____

Section 3 Current Income

Marital Status:

- Married
- Single
- Divorced
- Separated
- Widowed

List all dependents of you and your spouse, their ages, and their relationship to you.		
Name	Age	Relationship

Part A. Your Income

1. What is your occupation? _____
 2. Name and address of your employer:

 3. How long have you been employed there? _____
 4. Gross Income: \$ _____
 Taxes \$ _____
 Insurance \$ _____
 Other deductions: \$ _____
 Net Income \$ _____
 5. How often do you get paid? once a week
 every two weeks twice a month
 once a month other _____
 6. Do you receive income from the following:
 - a) business operations outside of your regular paycheck listed above? Yes No
 If Yes, how much per month \$ _____
 - b) income from real estate property? Yes No
 If Yes, how much per month \$ _____
 - c) interest or dividends? Yes No
 If Yes, how much per month \$ _____
 - d) alimony or family support payments for your use or for the care of your dependents? Yes No
 If Yes, how much per month \$ _____
 - e) social security or other forms of monetary government assistance? Yes No
 If Yes, how much per month \$ _____
 - f) retirement or pension money? Yes No
 If Yes, how much per month \$ _____
- Do you have any other sources of income not listed?

Part B. Spouse's Income

1. What is your spouse's occupation? _____
 2. Name and address of your spouse's employer:

 3. How long employed there? _____
 4. Gross Income: \$ _____
 Taxes \$ _____
 Insurance \$ _____
 Other deductions: \$ _____
 Net Income \$ _____
 5. How often do you get paid? once a week
 every two weeks twice a month
 once a month other _____
 6. Do you receive income from the following:
 - a) business operations outside of your regular paycheck listed above? Yes No
 If Yes, how much per month \$ _____
 - b) income from real estate property? Yes No
 If Yes, how much per month \$ _____
 - c) interest or dividends? Yes No
 If Yes, how much per month \$ _____
 - d) alimony or family support payments for your use or for the care of your dependents? Yes No
 If Yes, how much per month \$ _____
 - e) social security or other forms of monetary government assistance? Yes No
 If Yes, how much per month \$ _____
 - f) retirement or pension money? Yes No
 If Yes, how much per month \$ _____
- Do you have any other sources of income not listed?

Are you or your spouse expecting any increase or decrease in salary next year? If so, explain.

Section 4  Current Expenses

Do you and your spouse maintain separate households? No Yes. If so, fill one page out for your household and another for your spouse's.

The following questions ask for your expenses each month. If you are unsure of the amount you pay each month, but know the amount for a different period (per week, per day, every 2 months, etc.), write in the amount and the frequency that you pay the amount.

Indicate how much you pay for each item each month...

1. Your rent or your home mortgage \$ _____

Does that amount include real estate taxes? No Yes

Does it include property insurance? No Yes

2. Electricity and heating \$ _____

3. Water and sewage \$ _____

4. Telephone service/long distance \$ _____

5. Do you have any other utility bills? If so, what, and how much per month?

Cable \$ _____

Garbage \$ _____

Internet \$ _____

6. Home maintenance, including repairs and general upkeep \$ _____

7. Food \$ _____

8. Clothing \$ _____

9. Laundry and dry cleaning \$ _____

10. Medical and dental expenses \$ _____

11. Transportation (not including car payments) \$ _____

12. Entertainment, recreation, newspapers, magazines \$ _____

13. Charitable contributions \$ _____

14. Insurance NOT deducted from paycheck \$ _____

a) Homeowner's or renter's insurance \$ _____

b) Life insurance \$ _____

c) Health insurance \$ _____

d) Auto insurance \$ _____

- e) Other insurance _____ \$ _____
- 15. Taxes not deducted from paycheck \$ _____
- 16. Installment payments for car, furniture, etc. (Specify)
 - _____ \$ _____
 - _____ \$ _____
 - _____ \$ _____
- 17. Alimony, maintenance, support paid to others \$ _____
- 18. Payments for support of dependents not living at home \$ _____
- 19. Expenses from operation of business \$ _____

Additional Expenses

- 20. Mandatory payroll deductions not already listed _____ \$ _____
 - _____ \$ _____
- 21. Court ordered payments not already listed _____ \$ _____
 - _____ \$ _____
- 22. Education necessary to maintain employment \$ _____
- 23. Education for a physically or mentally challenged child \$ _____
- 24. Childcare \$ _____
- 25. Disability insurance (if not listed on line 14) \$ _____
- 26. Health savings accounts \$ _____
- 27. Care for elderly, chronically ill, or disabled family members \$ _____
- 28. Protection from family violence \$ _____
- 29. Education expense for your children under 18 \$ _____
- 30. Non-mandatory contributions to retirement accounts (including loan repayment)
 - _____ \$ _____
 - _____ \$ _____
- 31. Other expenses not listed above _____ \$ _____
 - _____ \$ _____
 - _____ \$ _____
 - _____ \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Section 5 & Debts

List in this section all debts that you owe, or that creditors claim that you owe. Please include mortgages, car loans, credit cards, gas cards, personal loans, etc. You must list all debt that you owe at the time of filing.

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

Creditor: _____
 Address: _____
 City, St., Zip: _____
 Cosignor: _____
 Type of Debt: Credit Card Student Loan Utility Car Loan
 (circle one) Mortgage Personal Loan Professional Services
 (Medical, Legal, etc.)
 Amount Owed \$ _____

8. List any gifts (other than ordinary holiday gifts) or charitable contributions made by you during the last 12 months (include the amount given and the party that received the property):

9. Describe any losses due to fire, theft or gambling during the last 12 months:

10. List all transfers of interest in properties during the last 4 years, include sales, refinances, assets put in trust or any other transfer of any kind (describe the property transferred, the value, date transferred, the parties involved in the transfer and your relationship to the parties):

11. Have you transferred any property into trust during the last 10 years? (Circle) Y N

12. List any financial accounts (bank accounts, cd's, stocks, etc.) closed during the last 12 months:

13. List the location of any safe deposit boxes and describe the contents:

14. List any setoffs that have occurred during the last 90 days:

15. List all property you are holding that belongs to anyone else (include the value of the property, its location and the name of the owner):

16. List all addresses where you have lived during the last 3 years (include the dates you lived at each):

17. List any former spouses you have had during the past 8 years if you lived in Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto Rico, Texas, Washington or Wisconsin:

18. List all business in which you have had an interest in the last 6 years (include the tax ID number, a description of the nature of the business, the business address, dates the business was operated, book keepers for the business and location of the business records):

By signing below you acknowledge you have reviewed the information requested and provided all requested information accurately to the best of you knowledge and ability:

Client

Client

Date Completed: _____

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BANKRUPTCY DISCLOSURE

Thank you for choosing Kuni Donaldson LLP to assist you with your financial difficulties. Bankruptcy can resolve many issues and provide you with a fresh start of your economic condition. To enable this, you need to be aware of the requirements the law has placed on you. This disclosure is intended to provide you with information regarding some of your responsibilities under the current law.

All information provided by you, related to your bankruptcy filing, must be complete, accurate and truthful. Therefore, it is extremely important for you to review all document filed in your case to ensure the information is correct.

The law requires you to list all assets and debts completely and accurately in your bankruptcy documents. You will be required to make a reasonable inquiry as to the value of your asset. If you are filing a Chapter 7 bankruptcy, the value of your unsecured assets should be the liquidation value of your property (ex. garage sale value). If you have property that is secured by a loan, the value should be the replacement value of the asset. These values can be obtained, from retailers, Kelly Blue Book, classified advertisements, and many other sources. When providing us with a complete list of your creditors, it is important to include the account number, the balance owed as of the last billing statement, and the address provided on billing statements that have been recently received.

To determine which form of bankruptcy you are eligible to file, we need a considerable amount of information regarding your income over the six months preceding the filing of your case. This will enable us to determine your current monthly income and disposable income, if any. Therefore, we will need information and documentation regarding all sources of income during the prior six months, regardless of the source (i.e. gifts, child support, etc.).

Finally, you must be aware, that information you provided in your bankruptcy documents may be audited by the Court or your trustee for accuracy. If this occurs, you may be required to provide additional documentation. Failure to provide such information may result in dismissal of your case and/or criminal sanction. We are confident this will not occur if the information you provide is accurate and you cooperate with the Court and your trustee.

If you wish to discuss this further, please contact our office. Thank you.

**IMPORTANT INFORMATION ABOUT BANKRUPTCY
ASSISTANCE SERVICES FROM AN ATTORNEY
OR BANKRUPTCY PETITION PREPARER
(527(b)disclosure)**

If you decide to seek bankruptcy relief, you can represent yourself, you can hire an attorney to represent you, or you can get help in some localities from a bankruptcy petition preparer who is not an attorney. **THE LAW REQUIRES AN ATTORNEY OR BANKRUPTCY PETITION PREPARER TO GIVE YOU A WRITTEN CONTRACT SPECIFYING WHAT THE ATTORNEY OR BANKRUPTCY PETITION PREPARER WILL DO FOR YOU AND HOW MUCH IT WILL COST.** Ask to see the contract before you hire anyone.

The following information helps you understand what must be done in a routine bankruptcy case to help you evaluate how much service you need. Although bankruptcy can be complex, many cases are routine.

Before filing a bankruptcy case, either you or your attorney should analyze your eligibility for different forms of debt relief available under the Bankruptcy Code and which form of relief is most likely to be beneficial for you. Be sure you understand the relief you can obtain and its limitations. To file a bankruptcy case, documents called a Petition, Schedules and Statement of Financial Affairs, as well as in some cases a Statement of Intention need to be prepared correctly and filed with the bankruptcy court. You will have to pay a filing fee to the bankruptcy court. Once your case starts, you will have to attend the required first meeting of creditors where you may be questioned by a court official called a 'trustee' and by creditors.

If you choose to file a chapter 7 case, you may be asked by a creditor to reaffirm a debt. You may want help deciding whether to do so. A creditor is not permitted to coerce you into reaffirming your debts.

If you choose to file a chapter 13 case in which you repay your creditors what you can afford over 3 to 5 years, you may also want help with preparing your chapter 13 plan and with the confirmation hearing on your plan which will be before a bankruptcy judge.

If you select another type of relief under the Bankruptcy Code other than chapter 7 or chapter 13, you will want to find out what should be done from someone familiar with that type of relief.

Your bankruptcy case may also involve litigation. You are generally permitted to represent yourself in litigation in bankruptcy court, but only attorneys, not bankruptcy petition preparers, can give you legal advice