



Documents Needed to Prepare Your Bankruptcy Case

Please send the following documents so we can prepare your case. If you're unsure whether something applies, send what you have and we'll help clarify.

1. Proof of Income (Last 7 Months)

Income for anyone filing, including:

- Pay stubs
- Child support or maintenance
- Social Security or Disability (award letters)
- Pension or retirement income
- Side or self-employment income (DoorDash, Uber, cash jobs, etc.)
- Any other regular monthly income

Self-employed clients may need a Profit & Loss Statement. Please confirm with the attorney before preparing one.

2. Filed Tax Return (Two Most Recent Returns)

- Two most recent federal tax returns
- Let us know if you have not filed in the last four years
- If obtained from IRS.gov, provide the **Tax Return Transcript** (not Account Transcript)

3. Photo ID & Social Security Card

- Clear photo or scan of your driver's license or state ID
- Clear photo or scan of your Social Security card
- If unavailable, a W-2 or 1099 showing your full Social Security number is usually acceptable

4. Bank Statements (Two Most Recent Statements)

Two most recent statements for **all accounts**, including:

- Checking and savings
- Cash App, Venmo, PayPal, Chime, etc.
- Zero-balance, inactive, shared, or child accounts where your name appears

Do not close accounts, remove your name, or move money without speaking to the attorney first.

5. Other Assets (If Applicable)

Retirement accounts, investment accounts, or other documentation to that may protect you and your assets.

6. Credit Counseling Course

- Court-approved course required
- Send us the completion certificate
- This may include medical bills, personal loans, payday loans, collections, or debts you recently remembered

7. Additional Creditors List (If Applicable)

Not all debts appear on a credit report. To ensure all of your creditors are properly included in your bankruptcy case, please complete the **Additional Creditors Not Listed on Credit Report** form if you have any debts that may not appear on your credit report.

This may include medical bills, personal loans, payday loans, collections, judgments, or any debts you later remembered.

For each additional creditor, please list the **creditor's name and mailing address**. Account numbers and amounts owed are optional but helpful if available.