

R.J. Atkinson LLP Attorneys At Law
BUSINESS BANKRUPTCY INTERVIEW/CONSULTATION FORM

DATE: _____

NAME OF BUSINESS: _____

ADDRESS OF BUSINESS: _____

TYPE OF BUSINESS ENGAGED IN: _____

DETAILED DESCRIPTION OF BUSINESS: _____

LEGAL FORM OF ENTITY: _____

DATE INCORPORATED/ORGANIZED/FORMED _____

TAX ID# _____

SHAREHOLDERS/PARTNERS NAMES/ADDRESS/PHONE #/PERCENTAGE OF INTEREST IN COMPANY:

1. _____

2. _____

3. _____

4. _____

5. _____

MONTHLY INCOME*attach profit and loss statement if available

Source _____ Amount _____

Source _____ Amount _____

Source _____ Amount _____

Source _____ Amount _____

Source _____ Amount _____

Source _____ Amount _____

MONTHLY OPERATING EXPENSES (not including unsecured debt repayment)

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

Type _____ Amount _____

**LIABILITIES/DEBTS: (SECURED W/COLLATERAL...
including factoring and loans against A/R)**

Creditor: _____ Principal Bal _____ Collateral _____

Creditor: _____ Principal Bal _____ Collateral _____

Creditor: _____ Principal Bal _____ Collateral _____

Creditor: _____ Principal Bal _____ Collateral _____

Creditor: _____ Principal Bal _____ Collateral _____

**LIABILITIES/DEBT
(UNSECURED WITHOUT COLLATERAL)**

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

Creditor: _____ Principal Bal _____

TAXES

IRS Liability: Amount _____ Year _____ Income/Payroll _____

Amount _____ Year _____ Income/Payroll _____

Amount _____ Year _____ Income/Payroll _____

Amount _____ Year _____ Income/Payroll _____

Amount _____ Year _____ Income/Payroll _____

Amount _____ Year _____ Income/Payroll _____

Real Property Taxes: Amount Due _____ Year _____

Taxing Authority _____

Amount Due _____ Year _____

Taxing Authority _____

Amount Due _____ Year _____

Taxing Authority _____

Personal/Business Property Taxes: Amount Due _____ Year _____

Taxing Authority _____

Amount Due _____ Year _____

Taxing Authority _____

Amount Due _____ Year _____

Taxing Authority _____

Sales Tax/Excise Tax/Other Taxes: Amount Due _____ Year _____

Taxing Authority _____

Amount Due _____ Year _____

Taxing Authority _____

LIST OF ASSETS

(Real Estate/Financial Assets/Inventory/Machinery/Tools/Electronics/Other)

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

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_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

_____ Resale/Auction Value _____

List of Litigation Pending and/or Judgments

attach copies of related documents

_____	v	_____
Plaintiff		Defendant
_____		_____
Plaintiff Atty/Phone #		Defendant Atty/phone #
_____	v	_____
Plaintiff		Defendant
_____		_____
Plaintiff Atty/Phone #		Defendant Atty/phone #
_____	v	_____
Plaintiff		Defendant
_____		_____
Plaintiff Atty/Phone #		Defendant Atty/phone #
_____	v	_____
Plaintiff		Defendant
_____		_____
Plaintiff Atty/Phone #		Defendant Atty/phone #

Other documents to attach, include, or bring with you:

1. Last 3 years tax returns
2. Copy of any financial statements issued to any party in the last 2 years
3. Copies of any security agreements the company is a party to
4. Recently prepared profit and loss statement
5. Accounts Receivable/Payable Report
6. Schedule of Tax Liabilities IRS/State Taxes/Property Taxes/Payroll Taxes etc...
7. List of Personal Guarantees & Guarantors if any
8. List of Utilities Electric/Telephone/Gas/Cable etc...
9. Bank Account Statements last 3 months
10. Amount of Cash on Hand and Source of those Funds

If you have any questions about any of the information requested above, or should any of the information not be readily available; please provide an estimate as to when the information will be available, or should the information be available via a third party (accountant, management company, etc..) please advise accordingly. It is important to provide as much of the requested information as possible prior to a case evaluation as to properly assess any potential legal matter.

