

# MIDDLE DISTRICT OF FLORIDA BANKRUPTCY PRO SE ASSISTANCE CLINIC

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## BANKRUPTCY PRE-FILING COUNSELING WORKSHEET

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

The undersigned attorney met with the above named client and the client was advised of the following:

Available Exemptions:

- \_\_\_\_\_ Homestead and \$1,000 personal property
  - \_\_\_\_\_ \$4,000 wildcard and \$1,000 personal property (no homestead)
  - \_\_\_\_\_ Pensions and/or retirement
  - \_\_\_\_\_ Automobile
  - \_\_\_\_\_ Wages
  - \_\_\_\_\_ Social Security Benefits
  - \_\_\_\_\_ Other: (please list)
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- \_\_\_\_\_ How to obtain a credit report ([annualcreditreport.com](http://annualcreditreport.com) or 1-877-322-8228)
- \_\_\_\_\_ Filing fee plus Administrative Fee. May also apply for a waiver or installment plan
- \_\_\_\_\_ Pre-filing Credit Counseling requirement
- \_\_\_\_\_ Post Petition Personal Financial Management requirement

Assets based only on client information and disclosure:

- \_\_\_\_\_ Homestead real property
  - \_\_\_\_\_ No non-exempt assets
  - \_\_\_\_\_ Non-exempt assets: (please list)
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Liabilities based only on client information and disclosure:

- |                            |                                       |
|----------------------------|---------------------------------------|
| _____ Secured              | _____ Repossessions                   |
| _____ Unsecured            | _____ Judgments                       |
| _____ Pending Lawsuits     | _____ Child Support / Spousal Support |
| _____ Tax Liabilities      | _____ Student Loans                   |
| _____ Other: (please list) |                                       |
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# RECOMMENDATIONS

\_\_\_\_\_ Chapter 7

\_\_\_\_\_ Chapter 13 (explain)

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\_\_\_\_\_ Eligible for bankruptcy but not recommended at this time (explain)

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\_\_\_\_\_ Other advice:

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Review client's assets and liabilities including exemptions

Client is judgment proof:        \_\_\_\_\_ Yes        \_\_\_\_\_ No

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Volunteer Attorney