

# K E L S E Y & T R A S K , P . C .

160 Speen Street, Suite 202, Framingham, Massachusetts 01701  
Tel: 508.655.5980 Fax: 508.655.5981

Justin L. Kelsey, Esq.

Matthew P. Trask, Esq.†  
(†Admitted in MA & NY)

.....  
Jonathan R. Eaton, Esq.

jkelsey@kelseytrask.com

mtrask@kelseytrask.com

.....  
jeaton@kelseytrask.com

## BANKRUPTCY CLIENT CHECKLIST

Please provide copies of the following to be retained by Kelsey & Trask, P.C.

CLIENT CHECKLIST	REQUIRED DOCUMENTS	ATTORNEY CHECKLIST
	Drivers License or Picture I.D.	
	Social Security Card	
	Deeds to home (if own home or other real estate) or Lease	
	Latest mortgage statement	
	Latest property tax bill	
	Copy of Homestead	
	Appraisal, broker's Price opinion or comparable market analysis	
	Title exam	
	Declaration page of property insurance with attachments	
	Auto title	
	Auto lease	
	Kelly Blue Book estimate of value (private sale) or: year, make, model, condition and mileage of car	
	Past 6 months of bank statements for each bank account	
	Most recent statements for 401K or IRA accounts	
	Divorce Judgment	
	Proof of Child Support and/or Alimony	
	Last 6 months of paystubs or proof of income	
	Proof of rental income	
	Proof of family contribution	
	Proof of social security	
	Proof of monthly pension payments	
	Proof of any other form of income	
	Tax returns and W2's for last 2 years	
	Credit card statements for last 3 months	
	Credit Counseling Certificate	
	Budget	
	Inventory	
	Financial Snapshot	

**Bankruptcy Client Checklist**

Page 2 of 2

**Documents that I cannot provide:**

---

---

---

---

---

---

---

**Reason:**

---

---

---

---

---

---

---