

Name(s): \_\_\_\_\_

Case # \_\_\_\_\_

**Narrative:**

Name of Business: \_\_\_\_\_

Type of Business: \_\_\_\_\_

Location of Business: \_\_\_\_\_

Is it Seasonal?: \_\_\_\_\_

**Questions:**

1 Are you incorporated? Yes or No

2 Have you provided documentation to the Ch 13 Office regarding your self-employed income?

Last two years of individual and Corporate Tax Returns\*\* Yes or No If no, explain on back of page.

\*\*To include complete set of schedules (ie:Sch C or E, W-2 forms, 1099 forms, K-1 schedules, etc.)

Profit and Loss statement for the current year Yes or No If no, explain on back of page.

Breakdown of monthly business income and expenses Yes or No If no, explain on back of page.

Proof of insurance for all business assets Yes or No If no, explain on back of page.

**\*\*\*Trustee will not recommend court approval of your plan until items in #2 above are provided to the Chapter 13 Office. If these documents cannot be provided, please explain on back of page.**

3 Do you have any employees? Yes or No How Many? \_\_\_\_\_

Are your payroll taxes current? Yes or No

4 Do you maintain liability insurance on your business? Yes or No

5 Do you have a business bank account? Yes or No

If yes, list the name of the institution \_\_\_\_\_

6 Are there any special licenses you must have to operate your business? Yes or No

\*Explain on back of page.

7 Do you collect and remit sales tax? Yes or No

Are your sales tax returns current? Yes or No

**Outlook:**

\* Has the business made a profit in the last twelve months? Yes or No Amount: \_\_\_\_\_

\* Is the business expected to make a profit each month for the next three years? Yes or No

*Use the space on the back of the page to clarify your answers from above.*

*or to provide further explanation of your business operations.*

\_\_\_\_\_  
Debtor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Debtor

\_\_\_\_\_  
Date

