

**CHECKLIST # 13a****CHECKLIST FOR CLIENT REVIEW OF PETITION AND SIGNATURES**

FOR: Chapter 7: Done by attorney \_\_\_\_\_ CLIENT: \_\_\_\_\_

Check  when done:**DOCUMENTS AND SIGNATURES:**

1.  Client has **reviewed** and **signed** all official forms and signed where required, including:
  - Form B1: Petition
  - Form B1D: Certification of completion of credit counseling
  - Form B6: Declaration re: Schedules
  - Form B8: Statement of intentions (if applicable<sup>1</sup>)
  - Form B21: Statement of social security number
  - Form B22A: Chapter 7 Statement of Current Monthly Income & Means Test Calculation
  - Form B7: Statement of financial affairs
2.  Client has reviewed all other documents, including certificates, to be filed with the petition.
3.  No changes, additions, or corrections are required.
4.  Changes, additions or **corrections are required**. See attached notes.
5.  Client has provided a copy of any "... record of any interest that a debtor has in an **education individual retirement account**"<sup>2</sup> under a qualified state tuition program.<sup>3</sup>
6.  Client has provided up-to-date copies of **pay-stubs** or other advices of payment within the 60 days prior to filing the petition; these must be filed with the petition.  
11 U.S.C. § 521(a)(1)(B)(iv).
7.  Client has provided attorney copy of the **IRS tax return** filed for most recent tax year (law firm will forward this to the trustee) OR  client promises to send to trustee.
8.  **Credit counseling course** has been completed and certificate received.
9.  The income information for calculation of the **CMI is current** through the last day of the month immediately preceding the month in which the petition is to be filed.  
11 U.S.C. § 101(10A)(A)(i).
10.  A signed copy of the retainer agreement is in the file.
11.  Law firm has collected the filing fee.
12.  There is no balance due for attorney's fees to date of petition.
13.  Client represents he/she has read the disclosure statements.

<sup>1</sup> Only applicable where the debtor has an installment purchase contract on a vehicle or other personal property with a balance still owed. Debtor must choose surrender, redeem, or reaffirm. In some jurisdictions, "ride-through."

<sup>2</sup> As defined under 26 U.S.C. § 530(b)(1)

<sup>3</sup> 11 U.S.C. § 521(c); As defined under 26 U.S.C. § 529(b)(1)

14.  Client has no questions regarding the law firm retainer agreement and billing policies, or all client questions about the agreement have been discussed and clarified.

**By signing below (I) (we) acknowledge attorney has reviewed the above matters and (I) (we) have signed all forms after reviewing them for accuracy and completeness.**

DATE: \_\_\_\_\_ SIGNED: \_\_\_\_\_

DATE: \_\_\_\_\_ SIGNED: \_\_\_\_\_