

# Checklist of documents to provide to Trustee Valdez prior to § 341 Meeting of Creditors (by uploading to the BKDocs portal).

- Proof of Identity and Social Security Number.** Color copies.
- Affidavit of Identification by Attorney.**
- Declaration of Electronic Filing.**
- Last 2 years of Tax Returns.** (For both debtors/non-filing spouse and any closely held company)
- Domestic Support Obligation Affidavit and Information.** The name and address for each recipient of the child/spousal support.
- Recent Mortgage Statement** for all properties owned by Debtors and or Debtor's non-filing spouse.
  - If you are paying a homestead as a total debt claim, provide a copy of the note or something that shows the date of maturity.
- Tax appraisals** on all real property owned by Debtors or Debtor's non-filing spouse.
- Retirement account loan statement.** Needs to show amount outstanding, monthly repayment, and date of completion.
- Proof of all income.** From all sources, for the six-month period prior to filing. This includes social security award letters, monthly operating reports/profit and loss forms, notarized affidavits from family stating their monthly contribution and their source of income.
- Bank statements.** For 60 days prior to filing and month of filing.
- Proof of secured/priority debts.** If no claim is filed and/or debt is paid direct.
- Divorce Decree.** If divorced within last 2 years.

If you have questions, please contact:

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