

United States Bankruptcy Court  
Western District of Washington

Chapter 13 Debtor(s) Requirement to Send Documents to the Trustee

**IMPORTANT INFORMATION - Please Read**

Chapter 13 debtors are required, pursuant to LBR 3015-1(f), to complete a Trustee Information Sheet and submit it to the Chapter 13 Trustee at the time of filing of the petition. The trustee will send a payroll directive to the employer listed on the sheet, if appropriate. A copy of the Trustee Information Sheet is attached to this notice. The trustee's name and address is on the Notice of Chapter 13 Bankruptcy Case, Meeting of Creditors and Deadlines. One of the following trustees is assigned to your case depending on where you live or whether you filed your case in Seattle or Tacoma.

K. Michael Fitzgerald	Michael G. Malaier
Chapter 13 Trustee	Chapter 13 Trustee
600 University St, Suite 2200	1551 Broadway, Suite 600
Seattle, WA 98101-4100	Tacoma, WA 98402

The trustee will conduct a § 341 meeting of creditors in your case. The date, time and location of the § 341 meeting of creditors is on the Notice of Chapter 13 Bankruptcy Case, Meeting of Creditors and Deadlines. You must attend this meeting, at which creditors may appear and ask questions regarding your financial affairs and property.

Chapter 13 debtors are required to provide COPIES of the following documents (or a written statement that the documentation does not exist or is not in your possession) to the trustee at least 7 days prior to the first date set for the § 341 meeting of creditors:

1. Your **Federal income tax return** for the most recent tax year ending immediately before the filing of your bankruptcy petition and for which a Federal income tax was filed, including any attachments, or a transcript of the tax return.
2. **Statements** for each of your checking, savings and investment accounts, including money market accounts, mutual funds and brokerage accounts for the time period that includes the date of the filing of the petition.
3. **Payment advices** or other evidence of payment (i.e., pay stubs and/or earnings statements) received from an employer within 60 days before the filing of the bankruptcy petition.
4. An **original signed declaration** attached to the front of the documents listed above. The declaration attached to this notice contains the required language. If you have a joint case, both debtors must sign the declaration.

**Notice:** If you fail to provide these documents to the trustee at least 7 days before your § 341 meeting of creditors, your case may be DISMISSED.

**Additional Documentation:** The Chapter 13 trustee may request that you provide additional documents, depending upon your case. In addition to the duties described in this notice, you may also have other duties to perform that are not listed here.

If any of the documents listed in this notice are filed with the court, the court will not forward them to the Chapter 13 trustee. It is the debtor's responsibility to send these documents directly to the trustee. For further information, please refer to the bankruptcy court's web site at [www.wawb.uscourts.gov](http://www.wawb.uscourts.gov).

UNITED STATES BANKRUPTCY COURT  
WESTERN DISTRICT OF WASHINGTON

In re

Bankruptcy Case No.

Debtor(s)

**Declaration Re: Debtor's Required Documents for Trustee**

I/we declare under penalty of perjury that the attached documents are true copies of the originals.

Please check the documents from the following list that are attached to this declaration.

- Federal Income Tax Return
- Payment Advices (i.e., Pay Stubs and/or Earning Statements)
- Checking, Savings or Investment Account Statement(s)
- Other (please explain) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Debtor's Printed Name

\_\_\_\_\_  
Debtor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Debtor's Printed Name  
(If any)

\_\_\_\_\_  
Joint Debtor's Signature  
(If any)

\_\_\_\_\_  
Date

CHAPTER 13 TRUSTEE INFORMATION SHEET

Debtors are required to complete and file this information sheet with the Chapter 13 Trustee **at the time a Chapter 13 case is filed**. The trustee will send a payroll directive, if appropriate, to the employer at the address listed on this sheet. Failure to list the proper payroll address may result in payment delinquency and a motion to dismiss by the trustee. If the plan provides for preconfirmation adequate protection payments or payments on a current obligation such as a mortgage, it is imperative for debtors to make the first plan payment to the trustee immediately rather than waiting for a payroll deduction to take effect, so that the trustee can disburse funds as soon as is practicable after the claim is filed. Payments must be made by cashier's check or money order with the case number listed, sent to the trustee's regular payment address.

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

DEBTOR 1

DEBTOR 2

NAME: \_\_\_\_\_

NAME: \_\_\_\_\_

Address is the same as Debtor 1

HOME ADDRESS:

HOME ADDRESS:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

MAILING ADDRESS:

MAILING ADDRESS:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

E-MAIL: \_\_\_\_\_

E-MAIL : \_\_\_\_\_

HOME PHONE: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_

**Employer addresses and phone numbers.**

Issue Wage Deduction on Debtor 1 or 2 (please check)

DEBTOR 1 [ ]

DEBTOR 2 [ ]

EMPLOYER NAME: \_\_\_\_\_

EMPLOYER NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

FAX: \_\_\_\_\_

PAID: WEEKLY [ ] BIWEEKLY [ ]

PAID: WEEKLY [ ] BIWEEKLY [ ]

MONTHLY [ ] SEMI-MONTHLY [ ]

MONTHLY [ ] SEMI-MONTHLY [ ]

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

DEBTOR 1: OTHER SOURCE OF INCOME: \_\_\_\_\_

DEBTOR 2: OTHER SOURCE OF INCOME: \_\_\_\_\_

**Tax returns:**

Before a plan can be confirmed, debtors must file with the appropriate tax authorities all applicable Federal, State and local tax returns for all taxable periods ending during the 4-year period ending on the date of the filing of the petition. Check the blanks below to indicate returns that have been filed; if a return has not been filed, do not check the blank. Write "NR" if you were not required to file. Write "EXT" if you have applied for an extension.

	<u>Federal</u>	<u>State</u>	<u>Local</u>
Most recent year	_____	_____	_____
2 <sup>nd</sup> year past	_____	_____	_____
3 <sup>rd</sup> year past	_____	_____	_____
4 <sup>th</sup> year past	_____	_____	_____

**If operating as a business, please attach an additional sheet listing the status of each required business return for the past 4 tax years.**

**Domestic Support Obligations:**

The trustee must have this information to send required notice to all holders of domestic support obligation claims pursuant to 11 USC §1302 (d)(1). If there are multiple claim holders, attach an additional sheet listing the name of the claim holder, and the claim holder's address and telephone number.

Debtor(s) have a domestic support obligation (please check below):

DEBTOR 1

DEBTOR 2

YES \_\_\_\_\_ NO \_\_\_\_\_

YES \_\_\_\_\_ NO \_\_\_\_\_

Name of claim holder: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

-----  
Name of claim holder: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

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**Debtor(s) certify that the information listed above, including tax return status, is accurate.**

Debtor 1: \_\_\_\_\_

Debtor 2: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_