

Client / Case Name: _____

Date Completed: _____

Business Information Schedule

To be completed only if within the last 2 YEARS you have been: an officer, director, managing executive, or owner of more than 5 percent of the voting securities of a corporation; a partner in a partnership; a sole proprietor of any business, or self employed?

Business Interests: List the Nature, Location and name of Business of which you were an officer, director, partner, managing executive or owned 5% of voting securities within last **2 years**

Business Name / Address	Nature of Business	Date Started	Date Ceased

Business Records: List Any Bookkeepers, accountants who have kept or supervised books of account and records for the business within last **6 years**

Name and Address	Services

Audits: List all firms who have audited account and records, or prepared financial statements for the business within last **2 years**.

Name and Address	Date and Service

Business Accounts / Records: List any Firms or individuals in possession of accounts at this time other than you.

Name and Address	Services

Financial Statements: List the name and address of financial institutions, creditors, and trade agencies to whom a financial statement was issued within the last **2 years**

Name and Address	Date of Statement

Inventory: List the following information for the last two inventories, if none so state.

Date of Inventory	Inventory	Supervisor	Dollar Amount
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List Name and address of persons having possession of the records of the inventories

Name and Address	Date of Inventory
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PARTNERSHIPS AND CORPORATIONS ONLY

*To be completed only where **the debtor** is the corporation or partnership itself. For example, this should not be completed if you are filing an individual bankruptcy but you owned a business that was a corporation or were a member of a partnership. If you have questions, please ask the attorney whether or not this needs to be completed.*

Corporate Management / Shareholders: List Current Partners, Officers, Shareholders, Directors.

Name and Address	Title / Nature of Interest	Percentage / Stock Ownership & Class
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Former Management / Owners / Shareholders: List All Former Partners, Officers, Directors, or Shareholders within **12 months**

Name and Address	Title (Corporation ONLY)	Date of Withdrawal / Termination
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Payments and Distributions: List all withdrawals or distributions given or credited to an insider within **12 months**, including compensation in any form, bonuses, loans, stock redemptions, options exercised.

Name and Address and Relationship	Purpose of Withdrawal	Amount / Value
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