

# LAW FIRM INFORMATION SHEET

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## Law Firm Information:

Name of Firm or Attorney \_\_\_\_\_  
Name of Contact if Different \_\_\_\_\_  
Address of Firm or Attorney \_\_\_\_\_  
Website \_\_\_\_\_  
E-mail \_\_\_\_\_  
Phone \_\_\_\_\_  
Additional Phone \_\_\_\_\_  
Preferred Method of Contact \_\_\_ Phone \_\_\_ E-mail \_\_\_ Either  
Current secretary or paralegal name \_\_\_\_\_  
Bankruptcy Software Used in Office \_\_\_\_\_  
Attorney Bar Number \_\_\_\_\_  
Bankruptcy Districts \_\_\_\_\_

## Accounting Information:

Contact Person \_\_\_\_\_  
Mailing Address for Invoices \_\_\_\_\_  
I understand invoices are due upon receipt once petition has been approved: \_\_\_\_\_  
Signature \_\_\_\_\_

## Bankruptcy Petition Information:

How would you like your final petitions to be handled?

\_\_\_ Pro Petitions paralegals shall draft all petitions, but I/We will electronically file them.

\_\_\_ Pro Petitions paralegals shall draft AND electronically file our petitions once approved.

ECF/PACER Login \_\_\_\_\_  
ECF/PACER Password \_\_\_\_\_  
Authorized Signature \_\_\_\_\_  
Print Name and Title \_\_\_\_\_

# AGREEMENT FOR SERVICES

This Agreement for Services is made between \_\_\_\_\_

\_\_\_\_\_

(hereinafter referred to as "Attorney" and Max Novikov, Pro Petitions, 4503 NE 18th Circle, Renton, WA 98059 (hereinafter referred to as "Virtual Bankruptcy Assistant (VBA)" on \_\_\_\_\_.

## ATTORNEY RESPONSIBILITIES

1. Attorney will ensure that debtor(s) have completed the mandatory Credit Counseling Requirement.
2. Attorney will have client(s) complete Client Intake Form (either Attorney's or one provided by Virtual Bankruptcy Assistant) and give debtor(s) Bankruptcy Document Check List to be returned with Intake forms. (attached)
3. When Client Intake forms and required documents are returned to the Attorney by client(s), Attorney to review Forms to ensure all information has been properly completed.
4. Attorney provides Virtual Bankruptcy Assistant with completed Client Intake Forms and copies of other information obtained from debtor(s).

These documents may be delivered to Virtual Bankruptcy Assistant by mail:

MaxNovikov  
ProPetitions  
4503 NE 18 Circle  
Renton, WA 98059

- Or FAX to 425-430-9346  
Or EMAL to maxn@propetitions.com  
Or Arrangements may be made for pick-up at attorney's office, if local.

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## VIRTUAL BANKRUPTCY ASSISTANT DUTIES:

1. Input of all data from Client Intake Forms into Bankruptcy software.
2. Compiling list of questions for debtor(s) to obtain the additional detailed information not provided on Client Intake Forms.
3. Contacting debtor(s) at a time convenient to them in order to obtain additional information (upon Attorney's approval).

**NOTE: VBA is well-versed in the knowledge of unauthorized practice of law. VBA will never provide legal advice to Attorney's debtor(s) when VBA contacts debtor(s) for any reason. Instead VBA's contact with debtor(s) is solely to gather information. If the debtor(s) should have a question regarding a legal**

matter, VBA will make a note for the Attorney and email the question(s) while retaining a copy of the email in the debtor(s) file.

4. **Market values of all motor vehicle from Kelly Blue Book website.**
5. **Internet search for all real property in debtor(s) name within county of residence.**
6. **Return draft of bankruptcy petition to Attorney for review.**
7. **Return Attorney Cover Sheet detailing potential problems or questions for the Attorney regarding case.**
8. **Changes made to draft of bankruptcy petition per Attorney's instructions.**
9. **Return of PDF (or Best Case file) of completed bankruptcy petition.**
10. **Electronic filing of bankruptcy petition upon acceptance if requested by Attorney.**
11. **Mailing of a copy of completed bankruptcy petition to debtor(s) and Court by Priority Mail, if requested by attorney.**
12. **Monitoring of case on PACER if requested by Attorney.**
13. **Preparation of letter to debtor(s) regarding 341 Meeting.**
14. **Maintenance of confidential debtor file at location of VBA which helps to provide a back-up for Attorney as well as information for VBA to complete other work as assigned by Attorney. Confidential file to be released to Attorney upon request.**

#### **COST FOR VIRTUAL BANKRUPTCY ASSISTANT SERVICES**

<b>Chapter 7 (up to 25 creditors).....</b>	<b>\$250.00</b>
<b>Chapter 7 (more than 25 creditors).....</b>	<b>\$300.00</b>
<b>Chapter 7 (business bankruptcy).....</b>	<b>\$325.00</b>
<b>Chapter 13 with Plan.....</b>	<b>\$350.00</b>

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**Note: Prices are subject to change but any changes will be discussed and agreed to by Attorney prior to implementation.**

## **ADDITIONAL FEES FOR EXPIRATION OF MEANS TEST**

When the Virtual Bankruptcy Assistant submits a final bankruptcy petition to the attorney, the Attorney has thirty (30) days to review the petition and make any changes before filing. However, if Attorney does not review the finished petition within thirty (30) days, the Means Test will expire and the petition cannot be filed.

In order to file the petition, the VBA must contact the client, obtain the updated figures for income, expenses and other assets and make changes to most of the Schedules and Forms of the bankruptcy petition.

To compensate VBA for the additional time it takes to prepare the updated Schedules and forms, there will be an additional \$75.00 charge to the Attorney if he or she allows the Means Test to expire.

## **PAYMENT FOR SERVICES**

There is no down payment required by Attorney to utilize the services of the VBA. This is done to assure the Attorney's satisfaction with VBA's services. However, after the petition has been finalized and accepted by Attorney, VBA will invoice the attorney for payment.

The Attorney has ten (10) days from the date of the invoice to pay the balance in full. If payment has not been made within ten (10) days from original invoice date, a late fee of ten percent (10%) will be assessed on a monthly basis for a period of no later than ninety (90) days.

Any invoice not paid by Attorney within ninety (90) days of the original date of the invoice will cause all services by the VBA to cease until the entire arrearage balance is paid in full.

## **CONFIDENTIALITY AGREEMENT**

The VBA agrees to maintain in confidence and not to disclose any confidential client information received from the Attorney other than to employees or agents who have a need to know the confidential information and approved by Attorney for release. Unless instructed by the Attorney, the VBA further agrees not to make any copies in whole or in part of confidential information or analyze samples of tangible materials included therein, which are not available on the open market or from other sources, for any purposes and will, up request by the Attorney, return all tangible materials furnished hereunder and any notes or memoranda of conversations relating thereto, including any copies thereof.

## **SIGNATURES**

Both parties agree to the terms set forth in this Agreement for Services and attest that both have retained a copy of this document for their own records. By signing below, we both affirm that the statements in this document are true and correct to the best of our knowledge.

\_\_\_\_\_  
Max Novikov

\_\_\_\_\_  
Attorney Name

**BANKRUPTCY DOCUMENT CHECKLIST**

- \_\_\_\_\_ **Certificate of credit counseling with copy of any repayment plan, if applicable.**
- \_\_\_\_\_ **Six (6) months of paycheck stubs from debtor(s).**
- \_\_\_\_\_ **Documents showing income from sources other than employment for six (6) months.**
- \_\_\_\_\_ **Federal tax returns two (2) years and W2's and/or 1099's showing income for previous two years.**
- \_\_\_\_\_ **Copies of titles and registrations for all motor vehicles, including recreational vehicles**
- \_\_\_\_\_ **Documentation of any auto loans or leases.**
- \_\_\_\_\_ **Recorded copy of Mortgage or Deed for any real property owned by debtor(s)**
- \_\_\_\_\_ **Documents verifying debtor(s) interest in any future property.**
- \_\_\_\_\_ **Evidence of value of real estate (i.e., appraisal dated no later than one year prior to filing bankruptcy)**
- \_\_\_\_\_ **Real Estate tax bills or assessment notices**
- \_\_\_\_\_ **Payoff or escrow statements for real property**
- \_\_\_\_\_ **Copies of closing statements/HUD statements for any transferred real property or refinances**
- \_\_\_\_\_ **Copies of most recent mortgage statement showing total monthly expense.**
- \_\_\_\_\_ **Foreclosure documents**
- \_\_\_\_\_ **Copy of residential rental or lease agreement and deposits made**
- \_\_\_\_\_ **Bank statements for last three (3) months**
- \_\_\_\_\_ **Stock certificates, bonds, credit union and passbook savings accounts and statements evidencing investments or savings.**
- \_\_\_\_\_ **Copies of all life insurance policies owned by debtor(s)**
- \_\_\_\_\_ **All documents relating to retirement accounts**
- \_\_\_\_\_ **Any documents indicating current loans against retirement accounts**

- \_\_\_\_\_ **Separation agreements or decrees of dissolution or divorce within past one (1) year**
- \_\_\_\_\_ **Copies of any lawsuits filed with the past two (2) years**
- \_\_\_\_\_ **Receipts for private school or other school expenses, if such a claim is made**
- \_\_\_\_\_ **Documentation to support additional food and closing and/or home energy expenses in excess of IRS standards**
- \_\_\_\_\_ **Legal documents evidencing money owed to you**
- \_\_\_\_\_ **Legal documents, accident reports or other documents regarding claim against other parties because of losses or injuries to you or your family**
- \_\_\_\_\_ **Current appraisals for valuable jewelry or collectibles**
- \_\_\_\_\_ **Current bills/statements for all creditors**
- \_\_\_\_\_ **Copies of all collection agency correspondence/documents**
- \_\_\_\_\_ **Copies of all Summonses, Complaints or other Court documents served upon debtor(s)**
- \_\_\_\_\_ **Verification of debtor's disabled veteran status for debtor asserting qualification for the disabled veteran safe harbor from means testing pursuant to § 707(b)(2)(D)**

**I (We) \_\_\_\_\_ and \_\_\_\_\_  
 Hereby acknowledge receipt of this Checklist and agree to provide all documentation listed above that is applicable to this case.**