



PENSION AND RETIREMENT PLAN INFORMATION

The U.S. Bankruptcy Code requires a complete disclosure of all of your personal property. This includes all pension, retirement, union retirement, 401K, 403B, 414H and other plans of which you are a beneficiary. **You must complete and return this sheet before your bankruptcy papers can be finalized.** We recommend that you call the benefits administrator at your employer directly and ask each question individually.

PENSION PLAN #1

1. Is this plan through your current employer? Yes _____ No _____
2. What type of pension is it? 401(k) _____ 403B _____ 414H _____
Pension With My Union (Write Name of Union) _____
This is an IRA That I Started On My Own _____
This is an IRA That I Had From A Former Employer _____
Other (Explain) _____
3. What is the current cash value of the pension? _____
4. What is the name of the company holding the pension plan? _____
5. What is the account number? _____

PENSION PLAN #2

1. Is this plan through your current employer? Yes _____ No _____
2. What type of pension is it? 401(k) _____ 403B _____ 414H _____
Pension With My Union (Write Name of Union) _____
This is an IRA That I Started On My Own _____
This is an IRA That I Had From A Former Employer _____
Other (Explain) _____
3. What is the current cash value of the pension? _____
4. What is the name of the company holding the pension plan? _____
5. What is the account number? _____

Do you have more retirement plans? If so, just make additional copies of this page.

I SWEAR UNDER PENALTY OF PERJURY THAT THE INFORMATION CONTAINED ON THIS PAGE IS TRUTHFUL AND COMPLETE.

CLIENT SIGNATURE