

SEND DOCUMENTS BY Blue Stylus - Trustee Collaborative

Attorneys: Register with and use the Blue Stylus - Trustee Collaborative system to send (upload) documents. That will give you more certainty in sending documents for your cases.

Start by registering. Go to <https://www.bluestylus.com> . When requested, supply the email address which you use to file documents at the bankruptcy court.

Next, read the instructions for Trustee Collaborative and review my suggested organization of labels for sending documents. (See page 2.) This will help you organize your PDF's for document production in the Trustee Collaborative system.

Then, enjoy the benefits of this system for producing documents!

My software provider, TrusteSolutions, offers information on this system . Go to: support@trustesolutions.com or call 866.878.7831, extension "1".

My assistant is Lori DeLand. If necessary, she can assist if you have further questions. Her email address is ldeland@meolilaw.com . Our phone number is 616.396.2124.

Please send documents **as soon as possible after the case is commenced**. If we request further documents, upload those on Trustee Collaborative, too.

Thank you,
Marcia R. Meoli, Trustee
Revised May 2015

Categories of documents

Income documents.

PLEASE SEND ONE PDF, UNLESS YOU RUN INTO THE SIZE LIMITATION.

Tax returns, payment advices and other income records. Provide the last filed state, federal and local tax returns with all attachments. Provide the debtor's payment advices and other evidence of payment received within 60 days prior to filing.

THE BANKRUPTCY CODE AND RULES REQUIRE THAT YOU SEND FEDERAL TAX RETURNS TO THE TRUSTEE AT LEAST 7 DAYS PRIOR TO THE FIRST DATE SET FOR THE 341 MEETING AND SEND INCOME DOCUMENTS OR THE CASE IS SUBJECT TO DISMISSAL. LOCAL RULE 1007-2(f) REQUIRES PAYMENT ADVICES AND TAX RETURNS TO BE PROVIDED NO LATER THAN 7 BUSINESS DAYS PRIOR TO THE FIRST DATE SET FOR THE 341 MEETING.

Real estate documents.

PLEASE SEND ONE PDF, UNLESS YOU RUN INTO THE SIZE LIMITATION. Organize documents according to each asset as listed on the schedules. Use common addresses if possible. Provide title documents (deeds, land contracts), most recent SEV assessment documents (real estate tax bills), all security and perfection documents (full copies of recorded mortgages, deeds of trust) and recent statements of amounts owed for secured debts against all real estate. LOCAL RULE 1007-2(f) REQUIRES BASIC DOCUMENTATION TO BE SENT TO THE TRUSTEE NO LATER THAN 7 DAYS PRIOR TO THE DATE FIRST SET FOR THE 341 MEETING.

Personal property documents.

PLEASE SEND ONE PDF, UNLESS YOU RUN INTO THE SIZE LIMITATION. Organize documents according to each asset as listed on the schedules. Copies of statements 90 days prior to and including the date of filing for all accounts, including bank accounts, investments accounts, etc.. Statements showing the nature and value for all retirement investments, life insurance policies, stocks, bonds, mutual funds or other investments at or near the date of filing. Titles or leases to all vehicles and recent balance statements from any vehicle lender or lessor. Other documents showing the nature and value of other assets. . LOCAL RULE 1007-2(f) REQUIRES BASIC DOCUMENTATION TO BE SENT TO THE TRUSTEE NO LATER THAN 7 DAYS PRIOR TO THE DATE FIRST SET FOR THE 341 MEETING.

Miscellaneous.

PLEASE SEND ONE PDF, UNLESS YOU RUN INTO THE SIZE LIMITATION. IN SIMPLE CASES, CONSIDER PLACING ALL DOCUMENTS IN ONE PDF HERE. All other documents. Organize documents according to each item as listed on the schedules or statement of financial affairs. Complaint, any Order or Judgment and any modification thereto for any recent divorce, collections or claim action for a debtor or other proceeding which might produce a recovery to the debtor. If a debtor is involved in a business, provide documents showing the nature and value of the assets and debts of all business(es) mentioned in the filing documents, including without limitation, balance sheets, recent tax returns, other financial statements with this information. . LOCAL RULE 1007-2(f) REQUIRES BASIC DOCUMENTATION TO BE SENT TO THE TRUSTEE NO LATER THAN 7 DAYS PRIOR TO THE DATE FIRST SET FOR THE 341 MEETING.