

SAMPLE CHECKLIST FOR PREPARING THE PSOC

THE TRUSTEE'S PSOC FORM MUST BE USED

Debtor(s): _____

Case Number: _____

- G Debtor name(s), case number and heading are correct.
- G All creditor objections are resolved.
- G SOC signed by all objecting creditors.
- G Court docket reviewed. Date reviewed: _____
- G Court's claims register and actual claims reviewed. Date reviewed: _____
- G Does the SOC comply with the Trustee's Recommendation?
- G Plan payment schedule, start date, and plan duration are correct.
- G Attorney fee amounts (paid and to be paid) are correct.
- G Applicable income tax return language present.
- G Applicable income tax refund language present.
- G Nonexempt property, such as tax refunds, already paid to the Trustee, if required.
- G Plan shortfall language in SOC.
- G Adequate protection language in SOC and amount is consistent with plan or AP order.
- G Plan and SOC not an informal proof of claim language is present.
- G Plan has provision that can delete payment to secured creditor if no secured claim filed.
- G Lien stripping or reclassification of inferior mortgage language?
- G Plan funding is adequate? Attach a funding report.
- G SOC cover letter provided and it addresses all issues in the Recommendation.
- G Other: _____