BEST WAYS TO CONDUCT A 341 MEETING

1. Be early.

2. Bring copies of all documents filed.

3. Bring copies of stubs and tax returns.

4. Check to make sure the Trustee was sent copies of documents.

5. Meet with your client ahead of the 341.
   a. Check for ID and SS# verification.

6. Give your client advice:
   a. Tell the truth, state the facts (just the facts ‘ma’am).
   b. Answer the questions Trustee asks. Don’t volunteer irrelevant information.
   c. If you don’t know or don’t remember, DON’T GUESS.
   d. The Trustee speaks quickly. If you don’t understand a question ask the Trustee to repeat the question.
   e. Review standard questions Trustee may ask.
   f. Ask if anything has changed since filing.
   g. Ask if anything needs to be corrected.
   h. Review the bankruptcy information sheet.
   i. Let client know what is going to happen after the 341.
   j. If a creditor asks questions, see the rules above.
   k. Are any creditors still collecting on the debts?

7. At the beginning of the 341 before it starts, indicate to the Trustee any issues that you identified that need to be corrected or amended.

8. During the 341 meeting, be attentive to your client. They may need to see a bankruptcy document to answer a question.

9. Don’t let the Trustee bully the client.

10. Keep good notes of any issues and follow up when you return to the office.

11. Discuss the meeting with the client after the meeting.