<u>Document Checklist</u>

Client Name:____

_____1. Intake Sheet

_____2. Copy of Drivers License and Social Security Cards

_____3. 7 months pay stubs (up to date of filing). If you own your own business will need a Profit & Loss.

_____4. 7 months of banking, savings, 401(k), IRA etc...

_____5. 2011-2012-2013 & 2014 taxes

_____6. Titles or registrations plus contracts to all vehicles

_____7. Deeds and Promissory Notes for each real property

_____8. Copy of insurance declaration for home and vehicles

_____9. Copy of any transferred properties in last 10 yrs

_____10. Copy of any lawsuit / garnishment paperwork

_____11. Case number to any previous bankruptcy

_____12. Divorce Decree and Child Support Order

_____15. Credit Counseling completed

_____16. Retirement, 401(k), Tespe, Erisa last quarterly statement.