



Below is a list of items we need to get from you to complete the financial analysis. Some items on the list may not apply to your situation, feel free to line through those that don't apply.

We may be able to get a start on much of the work even if you are unable to gather every item on the list. If you are having difficulty with a particular document, please let us know, we may have an alternative solution.

Our goal is to begin to create a thorough financial picture and we appreciate your assistance. We will partner with you through this process, so feel free to connect with us if you have any questions or concerns.

- Copies of all summons / judgments / foreclosure notices
- Copy of driver's licenses and social security cards
- Previous two years of tax returns, including W-2's and 1099's
- Sources of Income: All paystubs for past 6 months, retirement & social security statements, unemployment statements, etc.
- Bank statements for past two (2) months, all pages, all accounts for personal and business statements
- Information on sale/transfers made by debtors in the last twenty-four (24) months
- Retirement account statements (i.e. 401k, 403b, etc)
- Declaration page for life insurance (i.e. whole and term)
- Unpaid medical bills
- Any tax notices, real property or personal.
- Divorce Decrees
- Child Support Orders
- Mortgage Statements
- Car Note or Lease Statements
- Copy of the deed(s) to all properties
- Copy of all mortgages (first page, description, signature page and notary page) and last mortgage statement showing balance
- Appraisal, comparative market analysis or HUD-1 Form showing purchase within the last two years
- Copy of the homeowner's insurance policy showing the declaration page
- Kelly Blue Book/NADA vehicle value print out
- copies of or knowledge of any slip and fall or personal lawsuit injury claims