

Financial Planning Worksheet Checklist



Assemble as many of the following items you can to bring with you when you meet with the Financial Counselor:

- Current Leave and Earnings Statement
- Other pay statements
- Record of any other monthly income
- Current bank statements
- Recent credit report
- Letters of indebtedness or collections notices
- Current bills (showing minimum payment, balance, and APR)
 - Utility bills
 - Phone bills (home and cell)
 - Cable or Satellite
 - Internet
 - Credit Cards
 - Car Loan
 - Insurance Payments
 - Personal Loans
 - Student Loans
 - Other debts