

CHECKLIST

- Social Security Card
- Driver's License/I.D.

- Last 2 years Federal and State tax returns with W-2s , 1099s, Social Security Statements and all other documentation used to prepare taxes.

- Pay stubs for the last 6 months.

- If you are self-employed or own a business, we need a profit and loss statement covering the last six months (broken down month by month) and a balance sheet.

- Credit reports
 - Credit Bureaus
 - Transunion, Equifax, Experian
 - Credit Karma (make sure addresses, account #s, and dates are listed)
 - annualcreditreport.com

- All bills including collection letters & lawsuits

- Loan documents for non purchase money debt.

- Documents for each secured loan. If the debt is for a secured credit card, such as Sears or Kay Jewelers, please provide a copy of the statement showing when the charges were made on the secured merchandise.

Real Estate

- Recent appraisals
- Property tax assessment
- Deeds of Trust to your property
- Two most recent statements from mortgage company

Cars

- Loan Documents
- Leases
- Certificates of Title and Registrations
- Car loan bill

(Over)



- Copy of the past three (3) months credit card statements (for each credit card listed)
- Documents you have from prior bankruptcies.
- Any trust documents where you are the beneficiary
- Last two statements for any checking, savings or custodial accounts
- Residential/Commercial Lease agreements
- Foreclosure notices
- Retirement statements, stock or bonds (401K, PERA, etc..)
- Insurance policies on homes and autos.
- Loan documents for non purchase money debt.
- Dissolution of Marriage Orders and Permanent Orders Stipulations & Separation agreement.
- Child Support orders
- Life insurance policies
- Daycare statement if applicable
- Proof of tithing if applicable
- Credit Counseling certificate