

CHECKLIST

Please bring *copies* of the items listed below with you.

Client's Name: _____

Date:

- 1) Copy of Drivers License, Photo ID, etc.
- 2) Proof of Social Security Number (if not on Drivers License)
- 3) Verification of income for the past **6 months** (pay stubs and/or statements from Social Security)
- 4) Most Recent Bank Statements – all accounts
- 5) Federal & State Tax Returns for past **4** filing years
- 6) Copy of Automobile Title (or memo of title) or Lease Agreement
- 7) Proof of Automobile Insurance for all vehicles
- 8) Copy of legal description of home (deed or mortgage)
- 9) Copy of residential rental agreement
- 10) Proof of Homeowner's Insurance
- 11) Copies of all lawsuits
- 12) Life Insurance Policies
- 13) Retirement Plans (401-K, IRA)
- 14) Vehicle purchase agreements and disclosure statements

Please provide copies of each of the foregoing if you wish to keep the originals for your records

For Office Use

Chapter 7 Fee:

Chapter 13 Fee:

Other Information Needed and/or Action Plan: