

**PLEASE BRING THE FOLLOWING DOCUMENTS AND THE COMPLETED WORKSHEET TO YOUR NEXT APPOINTMENT:**

1. \_\_\_\_\_ All correspondence from collection agencies and attorneys.
2. \_\_\_\_\_ Deed to real property, if any.
3. \_\_\_\_\_ Summonses, complaints and judgments.
4. \_\_\_\_\_ Checkbooks and Savings books of both open and closed accounts maintained over the past two years.
5. \_\_\_\_\_ Documents evidencing secured creditors.
6. \_\_\_\_\_ Guarantees and notes signed as principal, endorser or co-maker.
7. \_\_\_\_\_ Insurance policies.
8. \_\_\_\_\_ Copy of most recent statement for each of your bank accounts and investment accounts, including checking, savings and money market accounts, mutual funds and brokerage accounts.
9. \_\_\_\_\_ Documents establishing claims of money due to you.
10. \_\_\_\_\_ Tax returns for the past four years.
11. \_\_\_\_\_ Copies of payment advices (i.e. pay stubs and/or earnings statements) for the past 6 months.
12. \_\_\_\_\_ Other: \_\_\_\_\_  
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