

Appointment Checklist

Please gather the following information for your session if possible:

- 1. Pay stubs for each source of income in the household
- 2. Mortgage statement (if applicable)
 - a. Association fees (if applicable)
 - b. Property taxes and home insurance
- 3. Utility statements
- 4. Loan statements
- 5. Credit card statements
- 6. Other debts or bills

Home Budget Expenses:

Please estimate your average monthly spending in the following areas:

Groceries	_____	Dry Cleaning/Laundry	_____
Work Lunches	_____	Church/Charity	_____
School Lunches	_____	Tuition/Books	_____
Cigarettes/Tobacco	_____	Medical Care	_____
Gasoline	_____	Day Care	_____
Auto Insurance	_____	Child Support/Alimony	_____
Life Insurance	_____	Entertainment	_____
Medical Insurance	_____		

Don't worry if you can't pull all this information together. Do your best and we'll help you with the rest.