

Appointment Checklist

TO ALLOW YOUR COUNSELOR TO PROVIDE A QUALITY SESSION, PLEASE BRING AS MANY RECENT STATEMENTS AS POSSIBLE.

1. Pay stubs for each source of income in the household _____
2. Mortgage/Rent Payment Amount _____
 - a. Association Fee Information, if applicable _____
 - b. Property Tax and Insurance Information _____
3. Utility Statements _____
 - a. Heat/Gas _____
 - b. Electric _____
 - c. Water _____
 - d. Telephone _____
 - e. Cable _____
 - f. Cellular Phone _____
 - g. Pager _____
 - h. Other _____
4. Automobile Payment and Insurance Information _____
5. Statements _____
 - a. Credit Cards _____
 - b. Medical/Dental Bills _____
 - c. Book/Music Clubs _____
 - d. Previous Years' Income Tax Statements, if not paid. _____
6. Loan Information _____
 - a. Bank/Finance Company Loans _____
 - b. Personal Loans _____
 - c. Student Loans _____
7. Other Applicable Items _____
 - a. Threatening Notices _____
 - b. Checkbook Register _____

Home Budget Expenses:

Some of the items listed here may not apply. You may not know the exact amounts you spend every month on many of these items, but we would like an average. If you have been spending more on certain items than you feel is reasonable, please list the dollar amount you think would be reasonable to spend.

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