



CHECKLIST

If available, bring the following information:

REAL ESTATE

- A. Copy of Recorded Mortgage _____
 - B. Copy of recorded Deed _____
 - C. Copy of complete Note (showing rate, term & original amount) _____
 - D. Statement showing name, address, and amount still owing _____
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LEASE AGREEMENT

- A. Copy of lease _____
 - B. Landlord's name and address _____
 - C. Amount of security deposits, if any _____
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ANNUITIES / 401K PLANS

- A. Recent statement showing current balance _____
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VEHICLES

- A. Title to all vehicles/Confirmation of Ownership/Registration _____
 - B. Name and address of Lending Institution _____
 - C. Account number _____
 - D. How much is owed on vehicle(s) _____
 - E. Copy of the original note showing the original amount, date, term, and the date of purchase _____
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STUDENT LOANS

- A. Statement showing how much is owed _____
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TAXES

- A. Copies of the last 2 years of income tax returns _____
 - B. All W2's _____
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CREDITORS

- A. Bring in all statements / collection letters _____
 - B. Credit Report (optional) _____
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MONTHLY INCOME

- A. Bring in current pay statements for all Parties working (at least 6 months) _____
 - B. Pension / retirement statements _____
 - C. Social Security statements _____
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SELF-EMPLOYED BUSINESS

- A. Taxpayer ID number _____
 - B. Profit and Loss statement from previous tax year _____
 - C. Inventory list with values _____
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IDENTIFICATION

- A. Driver's License _____
 - B. Social Security Card _____
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****Bring in any and all paperwork pertaining to court cases, documentation regarding transfer of property, statements regarding cash surrender value of insurance policy & statements to show child support arrangements.*