

# First Meeting Checklist

For your initial consultation, please bring with you the following items:

- A list of your routine monthly living expenses (e.g., rent or mortgage payments, utilities, food, clothing, car payments, insurance, etc.)
- A list of all of your assets and their approximate values.
- A credit report.
- A list of your household gross incomes.
- If you have a business, your current financial reports.
- If anybody has filed a lawsuit against you, copies of all Court documents related to that lawsuit.

If you decide to file, will need the following additional information:

- Copies of your state and federal tax returns for the past 2 years.
- Copies of your payroll check stubs for the last 6 months.
- An itemization of all payments over \$200 made to creditors within the past 12 months (regardless of whether the debt is now fully paid off or if there is still an amount owed).
- A list of any attorneys you have consulted within the past year.
- All life insurance policies, homeowners or renters policies, savings bonds, stock certificates.
- Copies of any leases, contracts, promissory notes, and/or financial statements you have signed/given to anybody within the last 3 years.
- If you are currently going through a divorce, or are recently divorced, a copy of all Court documents related to the divorce proceeding.