

PRODUCTION OF CLIENT'S DOCUMENTS

*Please bring **1 copy** of each of the following documents to your initial appointment:*

DESCRIPTION OF ITEMS	Found	Not Found
1. Federal Income Tax Returns for the last 3 years		
2. Pay stubs for the last 6 months for both spouses that show deductions from gross pay		
3. Your check register (which tends to establish your spending patterns) for the last 6 months		
4. The most recent annual statement of pension or retirement benefits furnished for each spouse		
5. Savings passbooks		
6. Certificates of deposit, Treasury bills, etc.		
7. Financial statements given to a banking institution in connection with a recent loan		
8. Monthly or quarterly bank statements for all checking and savings accounts for the past year		
9. Charge card (VISA; Master Card, American Express, etc.) statements for the last 6 months		
10. Warranty deeds, contracts, title insurance and other documents establishing ownership to real estate, such as your home		
11. Title certificates and registration statements for vehicles, boats, recreational vehicles, etc.		
12. If a business is owned, the tax returns for the past 3 years, annual profit and loss statements, and most current monthly or quarterly profit and loss statement and any other documents relating to unique aspects of business		
13. List of all current debts, monthly payments and reason for the debt		
14. Each employer's annual statement describing medical/life insurance benefits and profit sharing plans, etc.		
15. OTHER:		