



Simon, Fitzgerald, Cooke, Reed & Welch

Debtor(s): _____

APPOINTMENT CHECKLIST

Note: Failure to bring in all the requested documents may cause your appointment to be rescheduled for another day or your case may be dismissed.

<u>Items Needed Before your next appointment</u>	<u>Need</u>	<u>Received</u>
1. Proof of income from every member of your household or any other person who contributes to assist with your monthly bills or living expenses from _____ through current	_____	_____
a. Wages <i>(Anywhere from 60-180 days of documentation for both you and your spouse; or any other person regularly contributing to assist with any of your household living expenses)</i>	_____	_____
b. Social Security Award Letter	_____	_____
c. Retirement/ Pension Statement	_____	_____
d. Food Stamp Statement	_____	_____
e. Child Support/ Alimony <i>(Court Order)</i>	_____	_____
f. Oil, Gas, or Mineral Lease Income	_____	_____
g. Other Income _____	_____	_____
2. _____ Months of Business Income & Expense Statements if Self-Employed <i>(See Attached)</i>	_____	_____
<i>Note: Need a separate statement for each month. For every dollar amount you include on the statement supporting documentation for how that number was arrived at needs to be attached. Think of each business income and expenses document as a cover page that summarizes each month requested.</i>		
3. Last Filed Tax Returns for Both Federal & State <i>(For both you and your spouse)</i>	_____	_____
4. Loan Documents/ Rental Agreements for Direct Pay Debts		
a. 401k Loan(s) <i>(Need documents showing payoff balance and payoff date)</i>	_____	_____
b. Rent-to-Own Agreements <i>(Need documents showing payoff balance and payoff date)</i>	_____	_____
c. Other _____	_____	_____
5. A Cancelled Check or your Bank Account No. and Routing No.	_____	_____
6. Other: _____	_____	_____

If you should have any questions or concerns about any of the documents requested please call your paralegal _____ at 318-868-2600.