



Check List To Help You When Filling Out Your Intake Sheets

1. Read the instructions very carefully.
2. Get all your bills together, Customer Number, Address, and Phone number for each Creditor.
3. Six (6) months prior paycheck stubs.
4. Past two (2) years of W-2's
5. Any Bills that you currently owe.
6. Bank Accounts and any Investments Accounts most recent statements