

CHECKLIST

- ✦ Last 2 Pay Stubs (last two from all jobs)
- ✦ Last 2 years W2's
- ✦ Last 2 years Tax Returns
- ✦ Last 2 months Bank Statements
- ✦ Retirement/Pension Statement
- ✦ Savings/Investment Statements (last two statements of each job)
 - Money Market/Passport Savings
 - Mutual Funds
 - Stocks/Bonds
 - Savings Bonds
- ✦ Mortgage Statements (for all real estate owned)
- ✦ Last HUD/Closing Statement
- ✦ Insurance Policies:
 - Life
 - Auto
 - Homeowners
 - Disability
- ✦ All Bill Statements (credit cards, medical, furniture, student loans, etc.)
- ✦ Inventory of all personal property (valued in \$'s) (furniture, VCR, TV's, jewelry, etc)
- ✦ List of dreams/goals (new home, new car, new job, own your own business, etc.)