

Financial Planning Worksheet Checklist

Items you will need to start your Financial Planning Worksheet:

- ☐ Current LES
- ☐ Current Bills (showing minimum payment, balance, APR)
 - ☐ Utility Bills
 - ☐ Phone Bills (Home/Cell)
 - ☐ Cable/Satellite
 - ☐ Internet
 - ☐ Credit Cards
 - ☐ Car Loan
 - ☐ Insurance Payments
 - ☐ Personal Loans
 - ☐ Student Loans
 - ☐ Other Debts
- ☐ Current Bank Statements
- ☐ Recent Credit Report (if available)
- ☐ Letters of Indebtedness/Collections

Other items needed:

- ☐ Calculator
- ☐ Pencil

