FINANCIAL PLANNING WORKSHEET CHECKLIST

Items you will need to start your Financial Planning Worksheet:

☐ Current leave and earnings statement (LES)
☐ Other pay statements
☐ Record of any other monthly income
☐ Current bank statements
☐ Recent credit report
☐ Letters of indebtedness or collections notices
☐ Current bills (showing minimum payment, balance, and APR)
  ☐ Utility bills
  ☐ Phone bills (home and cell)
  ☐ Cable or satellite
  ☐ Internet
  ☐ Credit cards
  ☐ Car loan
  ☐ Insurance payments
  ☐ Personal loans
  ☐ Student loans
  ☐ Other debts