

# 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