

Financial Counseling Checklist

Your next meeting is _____ (day/date)
at _____ hrs,
at _____ (location)

Please bring the following items to assist in our meeting:

Item	Remarks
_____ Most recent LES	_____
_____ Bills (past/anticipated)	_____
_____ Correspondence from creditors	_____
_____ Contracts	_____
_____ Your budget OR _____	_____
_____ Completed Financial Planning Worksheet	_____
_____ Checkbook and register	_____
_____ Letters of Indebtedness	_____
_____ Most recent credit report	_____
_____ Other	_____

Financial counselor: _____

Telephone: _____