

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

