

NAME: _____

DATE: _____

FINANCIAL INFORMATION CHECKLIST FOR BUDGET PURPOSES

- ❖ Paycheck stubs for the last six (6) months for each employed person, including a non-filing spouse.
- ❖ Proof of tax refunds received within the last six (6) months.
- ❖ If you are in business, proof of your gross business income and business expenses for the past six (6) months.
- ❖ Proof of other sources of income such as pensions, interest, child support, severance pay and rental income for the last six (6) months.
- ❖ Any document which shows someone else in the household contributing to the income and household expenses.
- ❖ 401(k) or any other retirement fund disbursements.
- ❖ Proof of any other sources of monies received of any type or form within the last six (6) months.
- ❖ Checkbook register for the last six (6) months.
- ❖ Statements for each and every bank account, credit union account and investment or stock trading account for six (6) months prior to the bankruptcy filing date.
- ❖ Credit card statements for the past four months, including letters from any collection agencies.
- ❖ Business Financial Statements and tax returns for the past two years (2)