



**Financial Wellness Appointment Checklist:**

- Pay stubs for each source of income in the household (2 most recent for each)
- Checking Account Statements (3 most recent)
- Housing Invoices (Rent/Mortgage/Association Fees/Taxes/Home Insurance/Maintenance/Second Mortgage/etc.)
- Utility Statements (Electric/Gas/Oil/Water/Sewer/etc.)
- Loan Statements (Vehicle/Student Loan/Other)
- Credit Card Statements
- Other Outstanding Debts or Bills (Cable, Satellite, Internet, Phone (cell/home), etc.)

**Other Expense Information:**

Please estimate your average monthly spending in the following areas:

Saving	_____	Day Care	_____
Groceries	_____	Child Support/Alimony	_____
Cigarettes/Tobacco	_____	Sports/Hobbies	_____
Transportation Pass	_____	Entertainment/Eat-Out	_____
Gasoline	_____	Laundry/Dry Cleaning	_____
Auto Insurance	_____	School/Work Costs	_____
Life Insurance	_____	Other Taxes	_____
Medical Insurance	_____	Saving	_____
Medical Care	_____	Retirement	_____
Prescriptions	_____	Other	_____
Church/Charity	_____	Other	_____

***Don't worry if you can't pull all this information together. Do your best we'll help you with the rest!***