



FINANCIAL INFORMATION CHECKLIST

- Obtain credit reports from AnnualCreditReport.com
- Apply for your own credit card if you do not already have one
- Income information:
 1. Pay stubs
 2. Last 3 years filed tax returns, K-1's both personal and joint and any business tax returns if applicable
- Estimate your current monthly expenses
- Obtain Statements for:
 1. Checking, saving, money market, CD's
 2. Savings bonds, cash held in safety deposit boxes, safes, other locations
 3. Investment accounts and individual stock/bond accounts
 4. Retirement Accounts
 5. Get recent statement for both you and your husband from Social Security. You both can create an online account unless you have a statement that you received in the last year. <http://www.socialsecurity.gov/myaccount/>
 6. Closely held business interest and debt obligations
 7. Stock options
 8. Annuity holdings
 9. All life insurance policies
 10. Other insurance: disability, long-term care, home, auto, umbrella, other
 11. Mortgages
 12. Personal, auto, home equity, school loans
 13. Credit card statements and any other outstanding debt obligations
 14. Recent income/expense statements from rental properties, if applicable
- Make a secure list of user names and passwords for all accounts
- Make copies of any recent loan applications for credit cards, mortgages, home equity loans, etc.
- Fill out, to the best of your ability, asset/liabilities/income/expense worksheets and note source of data if not from statements