
DOCUMENTS NEEDED

If something on the list does not apply to you, please skip over it. **Please do your best to supply us with all of these documents when you make your final payment.** You can call the office and request an appointment with your Case Manager to review what you have. If you are unclear about an item, please call the office and ask to speak to your Case Manager before coming in.

Spouses: If you are filing without your spouse, you still must provide all of the following documentation for them as well.

- ☐ Copy of your driver's license (or picture ID) and Social Security Card.
- ☐ **Last 2 Years** IRS Tax Returns (the ENTIRE 1040 return, complete with ALL schedules and attachments as well as a copy of your W2s and 1099 forms)
Helpful Hints: If you do not have copies of these you can contact your accountant or tax preparer for these documents. You may be able to access them online if you prepared and filed them online. If you are unable to access them using these methods, you can order a copy of your tax transcript at any local IRS office or online at: www.irs.gov. We can help you do this in the office if needed but remember that they have to be mailed to you and this could take time.
- ☐ **Last 6 months** account statements for all accounts and the statement showing the balance on the date of filing including:
 - Checking and Savings Accounts
 - Credit Union Accounts
 - Money Market Accounts
 - 401(k), retirement or pension accounts*Helpful Hints: In many cases these statements can be accessed online. If you don't currently use online banking, you can call your bank and set this up. Once you have done this, we can help you print these statements in our office*
- ☐ **Last 6 months** pay advices or other proof of income including:
 - Unemployment
 - Child support
 - Social security
 - Profit and loss statements for self-employed clients*Helpful Hints: Many employers offer online pay stubs. Check with your employer about your options.*
- ☐ Most recent mortgage statement
Helpful Hints: If you are no longer receiving mortgage statements because your loan is in default, you can call your mortgage company and request a statement. If they cannot provide you with one then you should request a "Reinstatement and an Escrow Analysis." If they still refuse, you should send a request in writing. Ask us for information about how to request this in writing.
- ☐ Proof of automobile insurance (Declaration Page) if you are financing your vehicle.
Helpful Hints: If you are financing a car you are required to have full coverage auto insurance that shows the car finance company as "lose payee." If you don't have this, you must obtain it immediately or you could lose your vehicle. A call to your insurance agent should take care of this quickly.
- ☐ Copies of ALL lease agreements (land contracts, vehicles, apartments, etc.).

☐ Life insurance policies (if outside your employment).

☐ Court Documents for cases pending in the past 1 year including:

- Divorce decrees if granted in the past year
- Petition for divorce if not yet granted
- Original Petitions for any on-going suits whether you are plaintiff or defendant.
- Judgments for any completed lawsuits whether you are the plaintiff or defendant.

Helpful Hints: Sometimes these documents are available online. If you can't find the paperwork but can provide us with a case number or the names of the parties we might be able to help you find these online.

☐ Certificate of completion for Credit Counseling (if taken on your own)

Helpful Hints: If set up by us, this will be automatically provided to us upon completion.

☐ DSO Information – the name and address of the person who receives child support from you.

☐ All completed Law Firm paperwork (attached)

- Household Inventory Sheet
- Petition Questionnaires
- Creditor List or billing statements (for items not on your credit report)

☐ Other: _____