

Bring the Following Information to Your Initial Consultation

You need to provide **copies** of the following documents to my office for your initial appointment. It is very important that you provide copies (fax or pdf) of these items with you so that my analysis of your situation can be as complete as possible. **We do not accept originals.**

1. Copies of your driver's license & social security cards
2. Copies of your income tax returns for the last 2 years.
3. A copy of your last 6 months' worth of pay stubs from all employment.
4. A copy of property tax statements on all real estate you own or are buying.
5. A copy of last billing statement for mortgage(s).
6. A copy of last billing statement for all vehicles you are buying.
7. Copies of contracts for all autos you are buying.
8. A list of the value of stocks, deposit accounts, mineral interests, CD accounts, brokerage accounts, savings or checking accounts.
9. Copies of all legal documents pertaining to lawsuits which are pending, or which have been finalized in the past 12 months.
10. Copies of all judgments against you.
11. Copy of Divorce Decree if applicable
12. A copy of any divorce decree under which you are obligated to make Child Custody or Support Payments or even if you do not have those obligations, if the decree was entered in the last 5 years we need a copy of it.
13. If you operate a business, bring the business's most recent tax return and the most recent income and expense information, plus any premises or equipment leases.
14. Complete Attached Bank Balance Form