

SUPPORTING DOCUMENT CHECKLIST

Please bring copies of the following documentation and/or fees to your upcoming counseling session. Effective on January 7, 2015 there is a charge of \$5 for copies made in office. If you have any questions concerning the information requested, please contact us at (518) 690-0020.

REQUIRED MATERIALS:

- _____ Completed Income and Spending Plan (Attached)
- _____ \$18.40 Credit report fee per person or a tri-merge credit report with FICO® scores no more than 30 days old.
- _____ Proof of Income
 - One month of pay stubs
 - SSI/Disability award letter
 - Retirement Statement
 - Alimony and Child Support Documentation
- _____ Last three months Banking Statements
 - Checking and
 - Savings
- _____ Last 2 years of Federal Taxes
- _____ Last 2 years of W-2's
- _____ Divorce Decree or Separation Documents
- _____ Bankruptcy Documentation
- _____ Other: _____
- _____ Other: _____

Income and Spending Plan

Spending Group	Money Out & Savings Categories	Monthly Target Amt.	Actual Amt. Per Month	Periodic Expenses
<u>Savings</u>	Savings / Investments			
	First Home Club			
<u>Medical</u>	Medical Insurance			
	Co-Pays/Doctors			
	Non-Prescription Medication			
	Medication Prescribed			
	Veterinary			
<u>Education</u>	Student Fees			
	Tuition			
	Books			
	Supplies			
<u>Entertainment</u>	Cable / Satellite TV			
	Movies / Shows			
	Literature/Newspapers/Mags.			
	Travel Fares & Lodging			
<u>Housing</u>	Rent / Leases			
	Mortgage / Home			
	Furnishings			
	Home Repairs			
	Home Improvements			
	Insurance – Home/Renters			
	Utilities – Heat / Power			
	Utilities – Water/Sewer/Garbage			
	Cell Phone(s)			
	Telephone/Fax			
	Internet			
	Lawn Care/Snow Removal			
<u>Food</u>	Groceries			
	Meals Out			
	Kids Lunch			
	Pet Supplies			

OVER

Income and Spending Plan

Cont'd

Spending Group	Money Out & Savings Categories	Monthly Target Amt.	Actual Amt. Per Month	Periodic Expenses
<u>Personal Care</u>	Hair Cuts			
	Grooming			
	Laundry/Dry Cleaning			
<u>Transportation</u>	Auto Loan 1			
	Auto Loan 2			
	Gas/Oil			
	Auto Repir(s)			
	Insurance			
	Parking/Tolls			
	License/Registration			
	Auto Cleaning			
<u>Other</u>	Bank Charges			
	Child Care			
	Postage/Shipping			
	Gifts			
	Life Insurance			
	Misc. Money			
	Charitable Contributions			
	Credit Card 1			
	Credit Card 2			
	Credit Card 3			
	Credit Card 4			
	Credit Card 5			

TOTAL MONEY OUT / SAVINGS		
----------------------------------	--	--

		Monthly Target Amt.	Actual Amt. Per Month
INCOME	Wages/Salary 1		
	Wages/Salary 2		

TOTAL MONEY IN		
-----------------------	--	--