

# Gregory K. Stern, P.C.

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## Documents Checklist

Being well prepared and providing thorough documentation of your financial situation will help expedite your case and keep costs down. It also allows the attorneys to identify and address potential problems with your bankruptcy before you file. It is best if you can bring all of the following pertinent documentation to your first appointment. Having to change information at a later date can incur extra costs in court filing fees and attorney time.

- All creditor invoices and collection agency correspondence and notices received within the prior ninety (90) days for all bills (mortgage, car, credit cards, bank loans, medical, student loans etc.) other than utilities (unless there is a utility bill default)
- A list of personal property (item by item) with a valuation for each item representing the current value of the item
- Current account statements (bank, brokerage, financial, deferred compensation, pension, 401k, IRA, Education IRA or other account) for the prior 6 months
- All current paycheck advice(s) or stub(s) for the prior 6 months for yourself and any spouse
- All life insurance policy statement(s)
- Motor vehicle, motorcycle, boat & other titles
- All deeds showing ownership of your residence or any other real property
- Copy of all appraisals of your residence or any other real property within last 2 years
- Prior two (2) years Federal 1040 income tax returns and amended returns
- Copy of any foreclosure suit, other lawsuit or legal proceedings filed or pending within last year
- Copy of any personal injury suit, workmen's compensation suit or itemization of claim against any third party
- Copy of any current personal or real property lease(s)
- Information or itemization of any other personal property or real property not otherwise provided
- List of any prior addresses in last two (2) years and dates of occupancy
- List of payments totaling in excess of \$600.00 to any single creditor within the prior 90 days and the date(s) and amount(s) of payment(s) made
- Monthly family budget
- Copy of your driver's license and social security card
- A Credit Counseling Certificate received from an approved credit counseling agency within the prior 180 days and a copy of the debt repayment plan, if any, developed by the approved credit counseling agency for you. You may obtain this online by visiting Hummingbird Credit Counseling and Education's website at [www.hbcce.org](http://www.hbcce.org).