

Mack & Associates LLC

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1. Paystubs for the last 6 months, plus whatever you've received through the current month (Example: If you're filing on December 17, we need your paystubs from June 1st forward)
2. Bank statements for the last three months for any and all bank accounts your name is listed as an owner on
3. Copies of any retirement account statements (e.g. IRA, 401K, KPERs, tax deferred annuity plan, etc.)
4. Copy of the declaration page of your life insurance policy
5. Copy of any Divorce Decree Documents (Decree, Domestic Relations Affidavit, Separation and Property Settlement Agreement, Child Support Worksheet)
6. Copy of any will or estate planning documentation in which you have an interest in or are a beneficiary of
7. Complete copy of the current and last year's Federal and State Income Tax returns including W-2s, 1099s and other worksheets
8. Credit Card Statements for each account or statements for any entity that you owe money to (e.g. Medical bills, personal loans, loan deficiency, collecting agency, etc.)
9. Copy of your car title and registration
10. If you own property that has a lien on it, provide copies of any loan documents, such as security agreements, mortgages, deeds, titles to property, etc. If the property is a Mobile Home – provide a copy of the NOSI statement. Provide any financial documents relating to any loans for property. Copies of any refinancing documentation.
11. A copy of any lawsuits you were a party of in the last year
12. A copy of any garnishment information, including the total amount garnished in the last year and the name of the creditor for whom the money was garnished
13. Advise of any payments made to creditors within the last 90 days in the amount of more than \$600. Provide a copy of the check and the corresponding invoice or reason for payments.
14. Advise of any payments made to family members within the last year, regardless of the amount. Provide a copy of the check and the corresponding invoice or reason for payments.