

FINANCIAL PLANNING WORKSHEET CHECKLIST

Items you will need to start your Financial Planning Worksheet:

- Current leave and earnings statement (LES)
- Other pay statements
- Record of any other monthly income
- Current bank statements
- Recent credit report
- Letters of indebtedness or collections notices
- Current bills (showing minimum payment, balance, and APR)
 - Utility bills
 - Phone bills (home and cell)
 - Cable or satellite
 - Internet
 - Credit cards
 - Car loan
 - Insurance payments
 - Personal loans
 - Student loans
 - Other debts

PERSONAL FINANCIAL PLANNING
FOR CAREER TRANSITION