

Appointment Checklist

Call Accel toll-free at 877-33ACCEL

COMPLETING THIS CHECKLIST PRIOR TO YOUR COUNSELING SESSION WILL ASSIST IN DEVELOPING A COMPREHENSIVE FINANCIAL PICTURE.

	Monthly Average
<input type="checkbox"/> 1. Pay stubs for each source of income in the household	_____
<input type="checkbox"/> 2. Mortgage/Rent Payment Amount	_____
a. Association Fee Information, if applicable	_____
b. Property Tax and Insurance Information	_____
<input type="checkbox"/> 3. Utility Statements	_____
a. Heat/Gas	_____
b. Electric	_____
c. Water	_____
d. Telephone	_____
e. Cable	_____
f. Internet	_____
g. Cellular Phone	_____
h. Pager	_____
i. Other	_____
<input type="checkbox"/> 4. Automobile Payment and Insurance Information	_____
<input type="checkbox"/> 5. Statements	_____
a. Credit Cards	_____
b. Medical/Dental Bills	_____
c. Book/Music Clubs	_____
d. Previous Years' Income Tax Statements, if not paid.	_____
<input type="checkbox"/> 6. Loan Information	_____
a. Bank/Finance Company Loans	_____
b. Personal Loans	_____
c. Student Loans	_____
<input type="checkbox"/> 7. Other Applicable Items	_____
a. Threatening Notices	_____
b. Checkbook Register	_____

Home Budget Expenses:

Some of the items listed here may not apply. Additionally, if you do not know the exact amounts you spend every month on some items, suggest a realistic average. If you know you are overspending in some areas and are sure you could reduce these expenses, please suggest the more reasonable dollar amount.

Groceries	_____	Dry Cleaning/Laundry	_____
Work Lunches	_____	Church/Charity	_____
School Lunches	_____	Tuition/Books	_____
Cigarettes/Tobacco	_____	Medical Care	_____
Gasoline	_____	Day Care	_____
Auto Insurance	_____	Child Support/Alimony	_____
Life Insurance	_____	Entertainment	_____
Medical Insurance	_____		