

David C. Jones, Jr., P.C.

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DOCUMENT CHECKLIST

Signed Fee Agreement

Completed Intake Questionnaire

Certificate of Credit Counseling

Credit Report

Pay Stubs (last 6 months)

Documentation of Other Income (spousal/child support, disability, etc.)

Tax Returns (last 2 years)

Statements for your Debts – Credit Cards, Medical Bills, Loans, Etc.

Account Statements

Bank Accounts – checking, savings, etc

Retirement Accounts – 401(k), Pension, TSP, FERS, 403(b), etc.

Investment Accounts – Brokerage statements

Car Loan Statement

Mortgage Statement (for all real property owned)

Closing Packet for Real Estate Purchases or Refinances in last 3 years

Deed to Real Estate (copy)

Title to Vehicles Owned (copy)