

PCC Financial Counseling Checklist

Be sure to organize and bring the following items to your meeting with your financial counselor

Income

- Paychecks
- Social Security checks
- Unemployment checks
- Retirement/Pension
- Bonuses
- Other

Expenses

- Mortgage Statement
- Electric bills
- Water, sewer bills
- Car payments
- Cable, internet bills
- Phone/cell bills
- Personal loans
- Credit cards
- Medical bills

Statements

- Bank - Checking/Savings
- Mortgage
- Credit cards
- Other

If you have any debt (mortgage, auto loans, credit cards), fill out the Debt/Creditor Worksheet

Debt/Creditor Worksheet

#	Name of Creditor	Total Balance Due	Minimum Monthly Payment	Interest Rate	Check if applicable		
					Behind on ptms	Maxed out	Making Payments
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							