

JACK BERMAN & ASSOCIATES, PC

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The Below checked Items must be brought or emailed prior to your signing and filing your case.

Documentation Checklist	Have	Need
Last 6 months of Pay Stubs / MESC / SSI / Pension (Proof of Income) and first three after filing the case		
2021 Federal & State Tax Returns with W-2's		
2022 Federal & State Tax Returns with W-2's		
Recorded Mortgage(s)		
Recorded Deed		
Mortgage Statement(s)		
SEV (Property Tax Statement)		
Retirement Value Statements IRA, 401K or 403B		
Bank Statements for the past 3 months for all accounts in your name and the first statement for each account after filing the case		
Life Insurance Statements (if have cash surrender/loan value) – Whole Life		
Judgment of Divorce (within last 8 years)		
Car Titles / Lease Registrations & Current Statement		
Residential Leases		
Copy of Picture ID and Copy of Social Security Card		
All bills, judgments and garnishments		

I acknowledge that I am aware that I must bring the above checked items to my second appointment and that my case could fail if required documentation is not presented to the court. If additional court appearances are required because I do not produce documents I will pay reasonable attorney fees of \$100.00 per court date.

Date: _____ Debtor

Date: _____ Joint debtor