

Required Documents Checklist - 2015

NOTES: Email all documents if possible. Bring copies only – no original documents please.

- If you are married and living in the same house, you must provide your spouse's complete information, even if you are the only one filing.
- If you email documents please indicate in the Subject line what is in the email. For paper copies remove all staples, and paper clip documents together as necessary, or there may be an additional charge of \$100.

DOCUMENTS REQUIRED

The Last 2 Filed Federal & State Tax returns - you should be able to get copies from on-line or from your tax preparer. Please email those to me. You can also have them faxed directly to me by going to this site:

<http://1.usa.gov/1vSWuEd>

Proof of all types of income for the past six months

Income from all sources must be verified for the past SIX months. Income may be any combination of the following: employment, unemployment, pension, all forms of social security payments, child support, spousal support, food assistance, business income, rental income, interest/dividend income, and any other source of money that you receive on a regular basis such as help from a parent.

Insurance Policies

Life, vehicle, home, fire - declaration pages only showing coverage.

Property you own (real estate)

Property tax statements, copy of recorded leases, recorded mortgages, recorded deeds, and land contracts (You must get the recorded documents from the County Clerk's office in your county. The phone number for the Washtenaw County Clerk is (734) 222-6700. The Wayne County Register of Deeds is (313) 224-5854.)

Leases

Apartment, apartment sub-leases, or vehicles.

Vehicles you own or lease (cars, trucks, motorcycles, boats, mobile homes)

Only provide titles for vehicles that have your name on them. You can get titles from the Michigan

Secretary of State office.

Appraisals – go to www.kbb.com for cars, trucks, and motorcycles.

Financial Records

Six months of financial statements for all accounts on which your name appears (this includes accounts on which your name is listed that may be primarily in a parent or child's name)

___ If you do not have a bank account and are paid on a debit card, you will need to get a printout from the website where you can see your transactions.

___ Bank or credit union statements.

___ Retirement accounts – pension, IRA, 401k, 403b, etc.

___ Current statement from all secured lenders stating the amount owed – car/vehicle loans, mortgages, home equity, etc.

___ Savings bonds or stock certificates.

___ Most recent credit card account statements (if you are using a credit card, bring in the last three monthly statements. If you are not using a card, bring in the most recent statement you have.)

___ Proof of regular monthly expenses, i.e., utilities, transportation expenses, domestic support.

Other Documents

___ Any letters from attorneys about debts and all court papers relating to lawsuits, garnishments, seizures, etc.

___ Divorce judgment and property settlement agreements within the past 5 years.

___ Name, address, and telephone number of each person to whom you pay, or from whom you receive domestic support (child support, alimony).

___ Statement from the FOC or the State of Michigan showing support payments and status of any arrearages.

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Note: Check off each document provided or N/A for does not apply.

Tax Returns

___ either 2013 and 2014, or 2012 and 2013 state income tax return – all schedules including W-2's

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Income

___ Employment – The prior six months of weekly, bi-weekly or monthly pay stubs, or printout

___ Unemployment

___ Pension payment

___ All forms of Social Security retirement/SSI/SSD

___ Child or spousal support

___ Food assistance, WIC

___ Business income – month-by-month profit and loss

___ Rental property income – month-by-month profit and loss

___ Interest / dividend income

___ Other income – contributions to household expense by another person or family member

Insurance Policies

___ Life insurance policies with a cash surrender value, either owned by you or insuring your life

___ Vehicle insurance policies, not the proof of insurance you carry in your car

___ Home insurance policies

___ Fire insurance policies for rental properties

Real Estate

- Initial here if you want me to get these documents for you. There is a charge of \$50.
- Current property tax for most recent year – Summer & Winter
- Recorded Mortgages
- Recorded Deeds
- Recorded Land contracts

Leases

- Apartment
- Sub-lease
- Vehicles

Vehicles You Own

- Titles for vehicles, boats, mobile homes
- Vehicle asset appraisals

Financial Records

- Internet bank accounts – six months
- Bank or credit unions – six months
- Retirement accounts – pension, IRA, 401k, 403b, etc. Last quarterly statement
- Current statement from all secured lenders stating the amount owed – car/vehicle loans, mortgages, home equity, etc.
- Savings bonds or stock certificates.
- Most recent credit card account statements if used within 90 days
- Proof of regular monthly expenses, i.e., utilities, transportation expenses, domestic support

Other Documents

- Letters from bill collectors, court papers related to lawsuits or garnishments
- Divorce judgment and property settlement agreements within the past 5 years
- Name, address, and telephone number of each holder of a domestic support obligation
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