

**CHECKLIST OF DOCUMENTS NEEDED FOR 2<sup>ND</sup> APPOINTMENT**

**I only need the documents that apply to you.**

- Certificate of Completion** from a Court Approved Credit Counseling Agency. Go to [www.summitfe.org](http://www.summitfe.org) or [www.BothCourses.com](http://www.BothCourses.com) to complete the credit counseling course. The course must be completed before I can file your case with the court. The course takes a little over one hour. The Certificate of Completion is only good for 6 months upon completion.
- Add my e-mail address, [jason@jasoncouey.com](mailto:jason@jasoncouey.com), to your e-mail contacts to make sure you receive all e-mails from my office. *Important!*
- Sign & Date the **ATTORNEY FEE & ENGAGEMENT AGREEMENT** in the Bankruptcy Packet. *READ THIS*. Initial each page on the bottom right of each page and sign & date the last page.
- Fill out the **BANKRUPTCY QUESTIONNAIRE** Forms in the Bankruptcy Packet.
- Sign & Date the **INFORMATIONAL DISCLOSURES** in the Bankruptcy Packet.
- Provide me with documentation of any **lawsuit, divorce, and/or garnishment paperwork** where you were/are a party within the last 12 months.
- VERY IMPORTANT - Pay Stubs** or proof of income from employment and/or business going back six months before the anticipated filing date of your case to the present (**APRIL 2021 THROUGH CURRENT**).
- If you are self-employed, I need a **profit/loss statement** broken down by month from **JANUARY 2021 to present**.*
- 2019 & 2020 (if already filed 2020) Federal 1040 Tax Returns**. If you have not filed your 2019 or 2020 tax returns, I still need your last filed tax return.
- I need your **2019 & 2020 (if already received 2020) W2's and/or 1099's, etc.** to prove your income if you are married and file a joint tax return.
- Copy of your Picture Identification and Proof of Social Security Number
- Medical Bills, Collection Letters, and Payday Loan Documentation.
- Documentation of all Retirement Accounts (e.g., **401(K), 403(b), IRA's**, etc.)