

1200 Main St., Suite G, Irvine, CA 92614 Tel (714) 442-3300 Fax (714) 361-5382

- 1. We need to verify your identity and will need to review a <u>copy of your CA License</u> or government photo identification card <u>along with your social security card</u>.
- 2. We need personal financials, <u>including two years of state and federal tax returns</u>, and pay <u>stubs</u>. <u>Bank statements</u> are sometimes required for at least six months prior to filing.
- 3. If anyone sued you, please provide a copy of the lawsuit
- 4. We need copies of all <u>contracts or leases</u> that you have.
- 5. If we need anything after these pieces of information, we will let you know. Please feel free to submit anything else you'd like for us to review that may not be a part of this list. The more information we have to create the case, the better we can understand your situation and represent you.
- 6. A copy of your mortgage statement showing balances owed.
- 7. Please supply all <u>insurance documents</u> with the declarations pages. Evidence of insurance and continued insurance coverage is crucial.
- 8. You need to take <u>credit counseling</u>. Please go to our website and the credit counseling tab for options on obtaining a certificate.
- 9. We need to <u>understand your assets</u>. Please provide a copy of retirement or any other financial accounts you have as well as a KBB.com on any vehicles or anything to let us know any valuable item you own. Disclosure is key, and we need to show items you own.