

Necessary information/documents to bring with you

Please bring the items listed below to the meeting with your budget coach. Some of these items may not apply to you, or you may have additional financial information to bring. Please know that the more prepared you are for your meeting, the better we can serve you!

- Information about any and all income sources (bring two recent pay stubs).
- Information about your monthly retirement savings, how much your company matches, balances on your retirement accounts, and information about how your retirement funds are currently invested (bring a recent statement).
- The most recent statements (or amounts if there is no statement) for all of your monthly bills (mortgage/rent, electricity, utilities, cable, internet access, gym, etc.).
- Credit card statements – including monthly payment, balance on the card and interest rate information.
- Car loan statements – including monthly payment, balance owed and interest rate information.
- Student loan statements – including monthly payment, balance owed and interest rate information.
- Any other bills, monthly costs, and/or debts – including monthly payment, balance owed and interest rate information (if applicable).
- Insurance statements (car, homeowners/renters, life, etc.).
- Bank statements with account balances and interest rates.
- Other information about investments or savings that you have – including account balances.
- Thoughts about tithing/giving. We'll certainly talk about this when we get together, but it would be good for you to have thought about what you want to give to God first, before we put everything else into your budget.
- Knowledge about whether your employer will match funds you donate to non-profit organizations and whether a church fits their criteria.