**LP1 Financial Documents Checklist**

**Name** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Directions:** As you prepare for LP 2: Financial Assessment, you will need to compile key financial documents. Use this checklist to help you record the documents that you have already acquired.

**Financial Documents**

* Bank Statements
	+ Obtain bank statements from at least the past three months.
* Tax Returns
	+ Obtain your federal tax returns for the past 3 years.
* Credit Reports
	+ Obtain your current Credit Report from one of the major credit bureaus or from [www.annualcreditreport.com](http://www.annualcreditreport.com) or [www.creditkarma.com](http://www.creditkarma.com) (which gives it for free.)
* Investment or Savings Account Statements
	+ Obtain investment account statements from the past three months.
* Credit Card Statements
	+ Obtain recent statements for all major debt such as credit cards.
* Student and Business Loans
	+ Obtain recent statements from student and business loans.
* Mortgage Statements
	+ Obtain recent statements for any mortgages you are paying.

**Alternative Documents**

(If you don’t have any of the financial documents listed above.)

* Ledger
* Book keeping or other record of farming income and expenses