**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