LP1 Financial Documents Checklist

Name _	
Directions: As you prepare for <u>LP 2: Financial Assessment</u> , you will need to compile key financial documents. Use this checklist to help you record the documents that you have already acquired.	
Financi	al 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 or 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.
	don't have any of the financial documents listed above.)
	Ledger
	Book keeping or other record of farming income and expenses