

Financial Planning Worksheet Checklist

Items you will need in order to complete your *Financial Planning Worksheet*:

- Current Leave and Earnings Statement (LES)
- Other pay statements
- Record of any other monthly income
- Monthly bills and payments
 - Electricity/gas
 - Phone (home/cell)
 - Cable/satellite
 - Internet
 - Water/sewage/garbage
 - Insurance
- Debt payments (showing minimum payment, balance, APR)
 - Car loans
 - Personal loans
 - Student loans
 - Credit cards
 - Any other debt
- Current bank statements
- Current statements of investments (including TSP)
- Recent credit report (www.annualcreditreport.com)
- Values of your home and any property (www.homegain.com)
- Value of your cars and vehicles
 - www.kbb.com
 - www.nada.com
 - www.edmunds.com

Other items needed:

- Financial Planning Worksheet*
- Calculator
- Pencils

Resources:

- Command Financial Specialist
- Fleet and Family Support Center financial counselors
- Navy-Marine Corps Relief Society

