

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 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.

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