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

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