



Document Checklist

Dear Potential Client,

To schedule an appointment with one of our Foreclosure Mitigation Counselors please call 412-281-9773.

In order to better assist you, please bring the following information to your meeting:

1. Pay stubs and proof of all household income for the past 30 day period.
2. Most recent month's bank statements. (checking and savings)
3. Verification of other assets (401k, life insurance, stocks, bonds).
4. Creditor bills or any other bills you owe (doctors, insurance, loans, credit cards).
5. Most recent month's utility bills (water, sewage, garbage, electric, heat, phone, cable).
6. Most recent month's mortgage account statement and any letters or correspondence you have received from them in the past 30 days.
7. ORIGINAL LOAN DOCS (HUD 1 Settlement Statement, Truth in Lending Disclosure, Mortgage, Mortgage Rider, copy of Appraisal, Note and addendums, ARM Disclosure) if applicable.
8. Letter explaining the circumstances that led to your current situation.
9. A completed budget (see attached template).

Due to time sensitive deadlines relating to this process, it is imperative that you make every effort to provide the requested documentation at your scheduled appointment. Failure to provide this documentation can, but may not necessarily, delay the process. Note that if you cannot gather all of the requested documentation; please keep your scheduled appointment.

Monthly Budget

Housing Expenses		Living Expenses			
Mortgage (1st)	\$	Groceries	\$	Magazine Subscription(s)	\$
Mortgage (2nd)	\$	Lunches	\$	Newspaper	\$
Real Estate/ Property Taxes	\$	Paper Goods	\$	Day Care	\$
Hazard Ins.	\$	Toiletries	\$	Gifts & Entertainment	\$
Condo Fees	\$	Personal Needs	\$	Pet Care	\$
Assoc. Fees	\$	Tobacco Products	\$	Child Support/Alimony Paid	\$
Electric	\$	Alcoholic Beverages	\$	Union Dues	\$
Gas	\$	Clothing	\$	Pension Contr.	\$
Oil	\$	Laundry Detergent	\$	IRA Contr.	\$
Water	\$	Laundromat & Dry Cleaning	\$	401K Contr.	\$
Sewer	\$	TV Cable	\$	Personal Tax	\$
Trash	\$	Telephone	\$	Education	\$
Other	\$	Internet Fees	\$	Church	\$
Notes & Comments		Gasoline	\$	Tuition	\$
		Car Repairs	\$	Savings	\$
		Bus	\$	Auto Ins.	\$
		Dental & Doctor Bills	\$	Life Ins.	\$
		Prescriptions	\$	Medical Ins.	\$
		Cell Phone	\$	Dental Ins.	\$

TOTAL OF ABOVE

COLUMN: \$ _____

TOTAL OF ABOVE TWO

COLUMNS: \$ _____

(See next page for payments to credit cards, installment loans, etc.)

