



Commonwealth Catholic Charities

APPOINTMENT CHECKLIST

Please bring the following documentation to your appointment.

REQUIRED DOCUMENTATION

(All items listed here are required)

- ▶ Photo I.D. (*Driver's license/Passport/Permanent Resident Card*)
- ▶ Housing Verification (*Lease or Mortgage Statement*)
- ▶ Proof of Income – for **ALL** household members
 - Last 30 days (pay stubs, pensions, social security benefits, unemployment, alimony, child support)
- ▶ Completed Monthly Spending Plan*
- ▶ Completed Creditor List*

**enclosed with checklist*

FEES SECTION

Some appointment types require a credit report, the fee(s) for pulling the report are as follows, please note you must bring this fee to your appointment or call prior to your appointment to pay by phone (*credit/debit only*)*.

Credit Report Fees

- ▶ Individual: \$18.40
- ▶ Joint/Married: \$36.80

Acceptable Methods of Payment:

Cash (*exact change*), Cashier's Check, Credit/Debit Card or Money Order; Personal Checks are not accepted.

You will also need to bring the additional items located in the section specific to your appointment type:

<input type="checkbox"/> HOME PURCHASE	<ul style="list-style-type: none"> ▶ Credit Report Fee (<i>see Fee section above</i>) ▶ Previous Year Tax Return ▶ Asset Verification (stocks, bonds, real estate, life insurance policies) ▶ Bank Statements – (<i>last 60 days, checking and savings accounts</i>) ▶ Debt Verification (<i>loan statements, credit card statements, childcare, child support</i>) 	If Applicable <ul style="list-style-type: none"> ▶ Bankruptcy discharge letter – (<i>within last 7 years</i>) ▶ Homeowner Education – (<i>Certificate of Completion</i>) ▶ Pre-Approval from Lender ▶ Purchase Contract
<input type="checkbox"/> FORECLOSURE PREVENTION	<ul style="list-style-type: none"> ▶ Mortgage Statement (<i>any other correspondence from lender to include: default letters, collection letter, work out plans, hardship applications, etc.</i>) ▶ Asset Verification (stocks, bonds, real estate, life insurance policies) ▶ Bank Statements – (<i>last 60 days, checking and savings accounts</i>) ▶ Original Loan Documents (<i>Deed of Trust, Note</i>) 	
<input type="checkbox"/> CREDIT MANAGEMENT DEBT REDUCTION	<ul style="list-style-type: none"> ▶ Bank Statements – (<i>last 60 days, checking and savings accounts</i>) ▶ Asset Verification (stocks, bonds, real estate, life insurance policies) ▶ Credit Report Fee: (<i>see Fee section above</i>) ▶ Debt Verification (<i>loan statements, credit card statements, childcare, child support</i>) 	
<input type="checkbox"/> RENTAL COUNSELING	<ul style="list-style-type: none"> ▶ ANY communications (ledgers, letters, notices) from landlord/rental office 	

CONTACT YOUR COUNSELOR IF YOU HAVE ANY QUESTIONS ABOUT THE DOCUMENTATION

Revised 2.2016