

Fax to:  
 Email to:

Fax from: 410-822-9356  
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## Client List of Things To Do

1. **REAL ESTATE:** If you own, are buying, or have ANY interest (e.g. life estate, remainder, option) in real estate, free written **market analysis** by a real estate broker written on broker's letterhead **with three (3) comparable recent sales (less than 6 months old!)**. Copy of all Deeds, Mortgages, Deeds of Trusts, appraisals, Financing Statements, or Security Agreements. Check for judgments, federal & state tax liens in your Circuit Court house of your home county. **Get a copy of liens from the Clerk for us. If you have transferred or sold real estate in the last three years, all details on that. If you have real estate we MUST be given a copy from the Circuit Court of the judgment (and, in Baltimore City only, District Court as well),**
2. Payoffs for all secured debts (mortgages, cars, boats, trailers, homes, etc.)
3. List of all debts, account numbers, amount owed. If you own a business, all information on its debts, assets, inventor, equipment, liens, taxes, account receivable/payable, tax ID.
4. Copies of titles to all vehicles, motor homes, motor cycles, trucks, boats, etc.
5. **Pay stub or other income verification for the past six (6) months.** If married and not separated, for spouse too, even if not filing.
6. Digital pictures of all assets. (You can purchase a disposable camera and Walmart or any other developing service will put the images on a cd for you)
7. If married & not separated, spouses income for six (6) months. Copy of Divorce Papers.
8. Copy of Driver's License(s) & Social Security Card(s).
9. Credit Counseling Certificate. Contact Green Path. Or my Staff to arrange!
10. Copy of three year federal & state tax returns OR tax transcripts (one or the other) If self employed, tax returns with all schedules required. Without these, we will have to purchase tax transcripts which will cost about \$60. **FILE ALL TAX RETURNS!!!**
11. Read Booklet/CD. Re-read booklet! Review before first meeting of creditors.
12. Sign & Return Retainer letter & pay retainer.

**Call Jason or anyone at Green Path: 1-866-332-8435 or if you can't get through try 888-860-4220. If you do this at home you may pay with a debit card but not a credit card. If you do it at our office you may pay us by cash, money order, or certified check and we will have the counseling session billed to us.**