

# GREENPATH APPOINTMENT CHECKLIST

Making a phone call to GreenPath Financial Wellness is the first step in regaining control of your finances. Our financial experts will empower you to eliminate financial stress, get out of debt, increase savings, and lead a financially healthy life. You may find it helpful to gather the following information before your appointment.

## STATEMENTS

Please gather the following information for your session, if possible:

1. Pay stubs for each source of income in the household
2. Mortgage statement (if applicable)
  - a. Association fees (if applicable)
  - b. Property taxes and home insurance
3. Utility statements
4. Loan statements
5. Credit card statements
6. Other debts or bills

**For immediate service, or to request an appointment, call 877-337-3399 during the following hours:**

Mon-Thu: 8 am - 10pm ET

Fri: 8 am - 7 pm ET

Sat: 9 am - 6 pm ET

## HOME BUDGET EXPENSES

Please estimate your average monthly spending in the following areas:

Groceries	_____	Dry Cleaning/Laundry	_____
Work Lunches	_____	Church/Charity	_____
School Lunches	_____	Tuition/Books	_____
Cigarettes/Tobacco	_____	Medical Care	_____
Gasoline	_____	Day Care	_____
Auto Insurance	_____	Child Support/Alimony	_____
Life Insurance	_____	Entertainment	_____
Medical Insurance	_____		

*Don't worry if you can't pull all of this information together. Do your best and we'll help you with the rest.*

**877-337-3399**  
**www.greenpathref.com**

