

CLIENT DOCUMENTS NEEDED FOR REPRESENTATION

- 1) If minor children are involved in your case (examples would be issues regarding child custody and/or visitation), you are required to take a course entitled Children In The Middle. Please refer to the link on this website entitled **Children In The Middle** for details and a schedule of available courses.
- 2) Complete an Affidavit of Financial Status (a link to which is on this website) as accurately as you can. Obviously, this will take you some time to do, but it is imperative that you do it as soon as possible. You are the only one that can do it. Therefore, complete this as soon as possible and return it to me. If there is not enough space on the Affidavit of Financial Status (with regard to Subparagraph D on the second page), then continue those expenses on a separate sheet of paper in the same format as Subparagraph D, being sure to sign that page, as well, and have your signature notarized.
- 3) Complete a List of Typical Expenses (a link to which is on this website). You may not have all of these expenses. You may have some, but not others. This may help to spur your memory as to what expenses you have. I understand that if asked to list your expenses, it may be difficult to do. Therefore, review the List of Typical Expenses and include all expenses for each category. If there are expenses you have that are not on this list, include those as well.
- 4) Provide me with your Federal and State Income Tax Returns, and all accompanying schedules, for the last three years.
- 5) Provide me with your last three pay stubs or documentation showing year-to-date gross income and all deductions therefrom.
- 6) Advise me as to whether you have health insurance available through your employer for yourself, your spouse, and/or your dependants. Also, please advise me as to whether you have a family plan and how your family has been covered for health insurance up to this point.
- 7) Provide me with the most recent statement you have regarding any ownership interests that you have in any retirement plan, including the most recent statement from any 401(k), savings plan, profit sharing plan, or other retirement plan in which you have an interest.
- 8) Sign the Employee Records Authorization, Bank Release, and Farm Service Release (if applicable), links to each are on this website, and forward the completed forms to me