

FRESH LOOK CHECKLIST



Here is a list of documents to collect and bring to your **Fresh Look** appointment:

- Mortgage information (i.e. balance, rate, payment, term)
- Auto loan information (i.e. balance, rate, payment, term)
- Personal loan information (i.e. balance, rate, payment, term)
- Home Equity Line of Credit (HELOC) or Home Equity Loan information
- Credit card information (balances, interest rates, rewards program)
- Checking account balances and fees charged
- Youth accounts (youth checking/savings, 529 Plan, etc.)
- IRAs
- 401(k)
- Insurance (life, auto, home, renter)
- Government photo I.D. (driver's license, passport, etc.)

Every bit of information you provide helps us seek out savings for you!



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