

Financial Readiness Counseling Checklist Example

The first step towards addressing your financial concerns is attending the Group Intake, completing the budget packet received, gathering supporting documentation, and then attending an initial assessment appointment with one of our Accredited Financial Counselors.

If you are being Command-Referred to attend Financial Counseling, your Commander must sign a memo in order for you to be considered Command-Referred. For more information, call (706) 545-7517.

Financial Readiness Group Intake is every Monday (except Holidays). You must be signed in by 0815 hrs in Room 141, Army Community Service, Building 7, 7117 Baltzell Avenue. You then have up to 30 days to complete the instructions given and have the initial appointment with a counselor. Further instructions on how to complete the program are explained at Intake.

If you have not attended a successful initial counseling appointment within **thirty (30) days** from Intake, you will need to attend another Group Intake session and **restart** the process.

Minimum-required documents for Financial Counseling:

- Soldier's Leave and Earnings Statement (**LES**) for the past two months.
- Spouse's **paystubs** for the past month & verification of additional household income (i.e. child support, Social Security, VA income, Food Stamps, WIC, etc.)
- **All** most recent bills from each creditor, indicating **current balance, interest rate, and minimum payment**. For example, entire cell and/or telephone bill(s), cable/satellite/ internet, utilities and debt bills. If you pay your bills online or allotment and do not receive a paper bill, make sure to print the online bill or have the creditor print a current bill.
- Bank transaction (checkbook) **register(s)** for all checking accounts (at least 15 days before Intake and ongoing) that you have completed and kept up-to-date
- **Printout** for last 60 days of bank transactions from bank's online website or from the bank itself (for **all** checking and savings accounts).
- Any other **paperwork** that is relative to your financial situation, such as credit reports (old debts), all debt contracts and TSP statements and loan verifications.

We strongly recommend that Spouses attend counseling with Soldiers.

No children are allowed at the financial counseling appointment, as no child care is available on-site.

If you have any questions, please call (706) 545-7517. Our fax number is 545-8309.