



Supporting Documents Checklist

All documents must be submitted in PDF format

- All Sources of Income (*Check Stubs, Pensions, Annuities, Social Security including SSI Disability, Child Support, Alimony, Investment Income, etc.*)
- Bank and Financial Statements (*most recent 3 months*)
 - Checking, Savings, Money Market Accounts
 - Loans (*i.e. Mortgage, Auto, HELOC*)
 - Liquid Assets
 - Investment Accounts (IRA's, 401(k))
 - Credit Card Accounts
 - Insurance Policies, etc.
- Monthly Bills and Expenses (*most recent 3 months*), which can include:
 - Housing (Rent/Mortgage, Taxes, HOA fees, etc.)
 - Utility Costs (Electric, Gas, Cable/Internet, Cell phone, etc.)
 - Auto Insurance &/or Transportation Costs
 - Medical Expenses (Insurance Premiums, Prescriptions, Co-Pays, Dental, Vision, Out of Pocket expenses, etc.)
 - Student Loan Payments
 - Dependent Care Expenses (Day Care, Tuition, Transportation, etc.)
- Legal Proceedings (Child Support or other Court Ordered payments)
- If disabled, you need to show proof, such as hospital bills or government records
- If you own assets, please see **Assets-Required Documents** for additional requirements
- Any other financial obligations you would like to have considered (Personal Loans, etc.)

Note: This is not a complete listing of all the required supporting documents, additional documents may be required based on the circumstance of your financial situation.

Please use this Checklist when submitting additional supporting documents to us by mail or fax; **or** all documents can be submitting by uploading to our **Secure Client Portal**. Please email us at info@thegamblinggroup.com to setup online access.

Please mail to:



The Gamblin Group, LLC
12200 Ford Rd - Suite 100
Dallas, TX 75234

Fax to:



855-649-1930

Last Name: _____ Last 4 of SS#: _____