



APPOINTMENT

checklist

IDENTIFICATION

- | | |
|---|---|
| <input type="checkbox"/> SOCIAL SECURITY CARD | <input type="checkbox"/> CURRENT IMMIGRATION DOCUMENT |
| <input type="checkbox"/> DRIVERS LICENSE | <input type="checkbox"/> I-94 |

PROOF OF INCOME

- | | |
|--|---|
| <input type="checkbox"/> PAYSTUBS | <input type="checkbox"/> INTEREST INCOME |
| <input type="checkbox"/> PREVIOUS YEAR TAX RETURN | <input type="checkbox"/> DIVIDENDS |
| <input type="checkbox"/> UNEMPLOYMENT BENEFITS | <input type="checkbox"/> CASH FROM FRIENDS & FAMILY |
| <input type="checkbox"/> STATE DISABILITY PAYMENTS | |

ASSETS & RESOURCES

- | | |
|--|---|
| <input type="checkbox"/> BANK STATEMENTS | <input type="checkbox"/> CERTIFICATE OF DEPOSIT |
| <input type="checkbox"/> LIFE INSURANCE POLICIES | <input type="checkbox"/> STOCKS |
| <input type="checkbox"/> DISABILITY INSURANCE POLICIES | <input type="checkbox"/> BONDS |
| <input type="checkbox"/> BURIAL CONTRACTS | <input type="checkbox"/> MUTUAL FUNDS |
| <input type="checkbox"/> BURIAL PLOT INFORMATION | <input type="checkbox"/> PROPERTY DEEDS |
| <input type="checkbox"/> VEHICLE TITLES OR REGISTRATIONS | <input type="checkbox"/> TAX APPRAISAL STATEMENTS |

HOUSEHOLD

- | | |
|--|--|
| <input type="checkbox"/> NAME OF PERSON(S) IN HOME | <input type="checkbox"/> INCOME |
| <input type="checkbox"/> DATE OF BIRTH | <input type="checkbox"/> COST OF RENT/MORTGAGE |
| <input type="checkbox"/> SOCIAL SECURITY NUMBER | <input type="checkbox"/> COST OF UTILITIES |

WORK HISTORY (15 YEARS)

- | | |
|--|--|
| <input type="checkbox"/> EMPLOYER NAME | <input type="checkbox"/> SALARY |
| <input type="checkbox"/> DATES OF EMPLOYMENT | <input type="checkbox"/> JOB DUTIES/RESPONSIBILITIES C |

MEDICAL HISTORY (2 YEARS)

- | | |
|--|--|
| <input type="checkbox"/> LIST OF SOURCES | <input type="checkbox"/> COPIES OF EVALUATIONS |
| <input type="checkbox"/> COPIES OF LAB REPORTS | <input type="checkbox"/> COPIES OF MEDICAL NOTES |

EDUCATION

- | | |
|---|---|
| <input type="checkbox"/> INDIVIDUALIZED EDUCATION
PLAN (IEP) | <input type="checkbox"/> EVALUATION REPORT (ER) |
| | <input type="checkbox"/> 504 PLAN |