

# LPF HOMES LLC

## FINANCIAL REVIEW

### What To Expect

A monthly financial review with the LPF Homes Manager lasting approximately 1 hour.

### Initial Meeting

Bring the following items to verify the info for the Budget Sheet. The LPF Homes Manager can assist with filling out the Budget Sheet and answering Sheet questions during meeting.

- Budget Sheet
- Pay Stubs For Last 3 Months
- Bank Statements For Last 3 Months
- Credit Card Statements For Last 3 Months
- Insurance Statement
  - Home
  - Car
- Tax Statement
  - Property
  - Car
- Recent Utility Bills
- A List Of Anything Else Not Represented Above That You Are Getting Money From (Side Jobs, Relatives, etc)
- A List Of Anything Else That You Are Paying Money To On A Recurring Basis (Relatives, Payday Loans, Medical Bills, etc)
- A List Of Anything Else That You Are Putting Money In That You Can Get Access To Later (Retirement Account, Other Bank Accounts, A Safe At Home, Bank Box, etc)

### Routine Meetings

Once the initial Budget Sheet is established and homeowner/Manager feels comfortable with the data, regular monthly meetings will be established to review these items:

- Budget Sheet (*Filled Out By LPF Homeowner Prior To Meeting*)
- Recent Pay Stubs
- Recent Bank Statements
- Recent Credit Card Statements
- Recent Retirement Plan Account Statements