

MONTHLY CHECK LIST TO AiBz ✓

Name:

Phone:

email:

BANK STATEMENTS	✓
CREDIT CARD STATEMENTS	
LOAN – MORTGAGE STATEMENTS	
PAYROLL REPORTS	
RETAIL STATEMENTS (i.e.HOME DEPOT)	
RECEIPTS–INCLUDING CASH SPENT OOP (Out of Pocket – from Personal)	
CHECK REGISTERS OR CHECK STUBS	
BANK TRANSFERS	
DEPOSIT INFORMATION BY CUSTOMER	
MERCHANT CREDIT CARD STATEMENTS	
OTHER – SALES TAX REPORTS	

THANK YOU!

Lucinda Lintz

Taking Care of YOUR Financial Clarity!

EFAX 1-801-937-7970