

# **Budget for Success**

## **Steps to Success**

- 1. Sign up for the program. We will provide you with 12 personalized envelopes, one for each month. You will fill them with the following and forward them to our office (Mail, deliver or scan and email):**
  - a. Pay check stubs**
  - b. Bank and credit card statements**
  - c. Cash receipts**
  - d. Investment statements**
  - e. Rental property management statements**
  - f. Other income statements**
- 2. TrustLedger will enter your data into our secure data base and then produce the following reports that will be emailed or mailed to you: (Click on the report to see a sample)**
  - a. Expense Report – Monthly and year to date**
  - b. Income Report – Monthly and year to date**
  - c. Budget Report – Monthly and year to date analysis of income and expense budget vs actual**
  - d. Balance Sheet – Assets and Liabilities showing net worth as of that month**
- 3. TrustLedger will mail back to you your source documents.**
- 4. In January, as soon as all the final tax documents have been received, TrustLedger will prepare your tax return, forward it to you for your approval, and then file it electronically.**
- 5. PRIVACY POLICY: TRUSTEDGER WARRANTS THAT WE WILL NOT USE ANY OF YOUR DATA FOR ANY OTHER PURPOSE THAN THAT REPORTED HERE. WE WILL NOT SELL YOUR INFORMATION TO ANY THIRD PARTY. WE WILL NOT USE IT FOR OUR OWN MARKETING PURPOSES.**