



**Souksamlane
associates**

Alison Flaum Souksamlane
CLU, ChFC
WEALTH ADVISER
CA Ins. License #0C42792

4081 De Zavala Road, Suite 2
San Antonio, Texas 78249
Telephone: (210)321-1421
Toll Free: (800)967-8924
Fax: (210)341-7687
Toll Free Fax: (800)971-7361

Items to Remember

In an effort to stay current of your situation please remember to fax or drop off to our office, prior to your appointment, the most recent version of the following items, if such items have been generated since our last meeting:

- Most recent personal and business tax Return
- Social Security Statement
- Employer retirement plan statements
- Account statements for investments not through our office
- Most recent pay stub/YTD income statement for self-employed
- Your mortgage statement
- Your policy binder
- Items on your homework list
- Loan Documents, (any new loans)
- Current Drivers License
- Other items you would like me to review

Once again, we appreciate the opportunity to continue being of service and value to you and you family. We look forward to seeing you soon.

Existing clients/2006/04

www.souksamlaneassociates.com

Alison Flaum Souksamlane, Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, 8000 IH-10 West, #800, San Antonio, Texas 78230, 210-342-7878. Financial adviser offering investment advisory services through Eagle Strategies, A Registered Investment Adviser. Souksamlane Associates is not owned or operated by NYLIFE Securities LLC or its affiliates. Member agent of The Nautilus Group, a service of New York Life Insurance Company.