



**Souksamlane
associates**

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Items to Remember

In an effort to become familiar with your current situation, on your appointment date, please bring with you the following items:

- Personal and business tax return with all schedules for past two years
- Social Security Statements
- Employer retirement plan statements
- Account statements for investments/savings/bank
- Mortgage statements for primary and investment property
- Last two pay stubs/ YTD income statement for self-employed
- Employer's benefit information
- Wills and other related legal documents
- Business entity or contract documents
- All business insurance contracts
- All personal insurance contracts
- Credit card statements
- Current drivers license
- Loan documents, any personal/ business loans, (house, vehicle, property)
- Other items you would like me to review

We appreciate the opportunity to be of value to you and your family. We look forward to visiting you.

New clients2006/04

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.