

## 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.

[www.SimplifyingWealth.com](http://www.SimplifyingWealth.com)

4081 De Zavala Road, Suite #2, San Antonio, TX 78249 (800) 696-4195 **Toll Free Telephone** (800) 203-2051 **Toll Free Fax** [Alison@SimplifyingWealth.com](mailto:Alison@SimplifyingWealth.com) **E-Mail**