FourSquare
Financial Group
Helping You Prosper On Purpose™

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In order to prepare for our next meeting, please gather as much of the following information as is available:

- Cash flow analysis (enclosed form may be helpful)
- Most recent 2 years Federal income tax returns (include W2 forms)
- Most recent 2 years State and Local income tax returns
- Pay stub (most recent or most typical)
- Your Will and your spouse's Will (if married)
- Any Trust with which you are involved
- All life insurance policies (include most recent cash value statements, if any)
- All disability income insurance policies
- All annuity contracts (include most recent value statements)
- Most current statements from: banks, credit unions, mutual funds, investments, etc.
- Most current pension statements (401(k), TSA, IRA, etc.)
- Current amount of group insurance with employer (employee benefit booklets)
- List of outstanding debts
- List of notes receivable (moneys owed to you)
- Property assets: (current market value)

Residence:	________________
Other real estate	________________
Household furnishings	________________
Automobiles	________________
Other personal property	________________

- Personal financial statement (if you have one)

We will review these documents and return them promptly. Thank you for placing your confidence in us. We are looking forward to working with you.