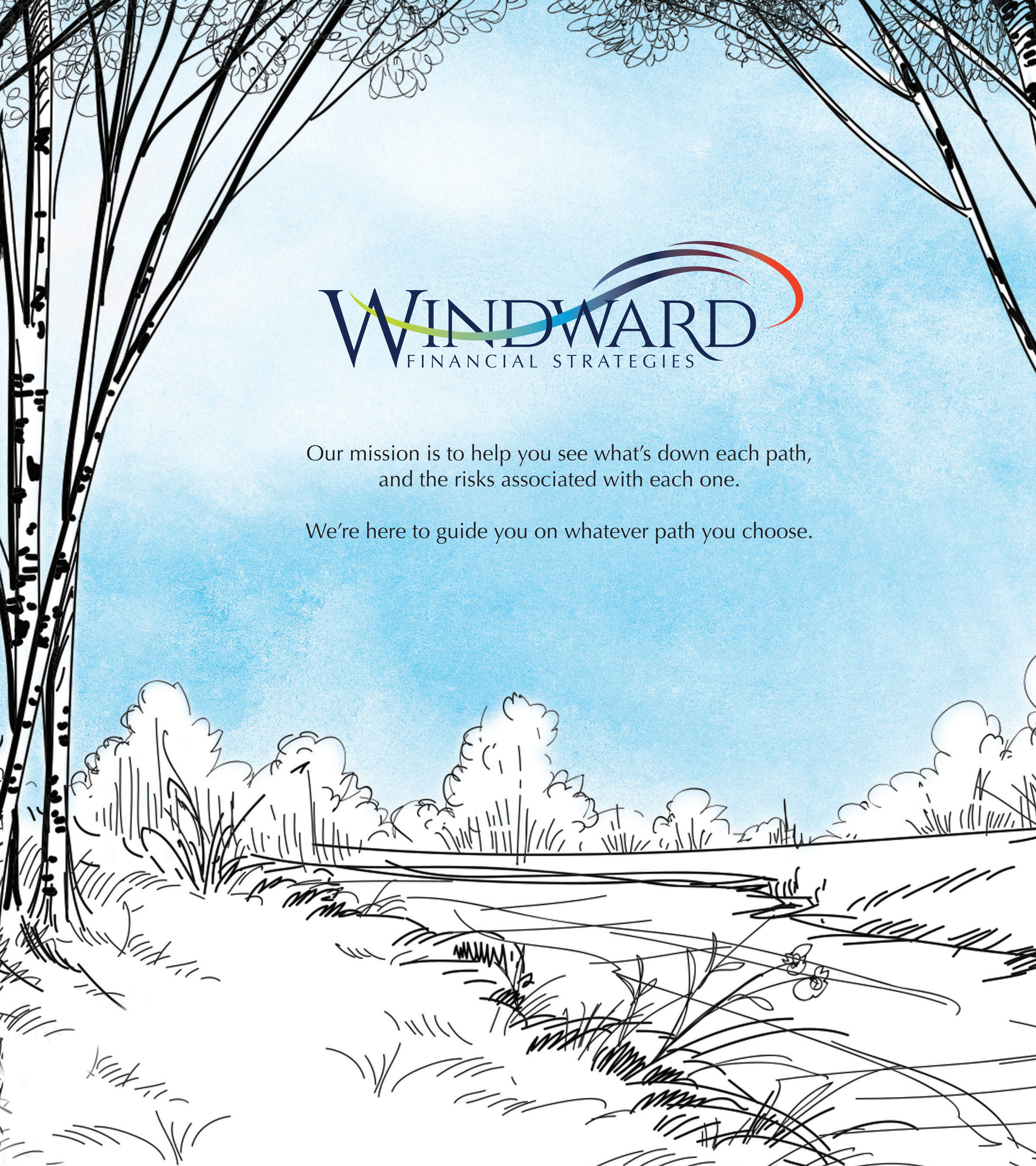


WINDWARD
FINANCIAL STRATEGIES

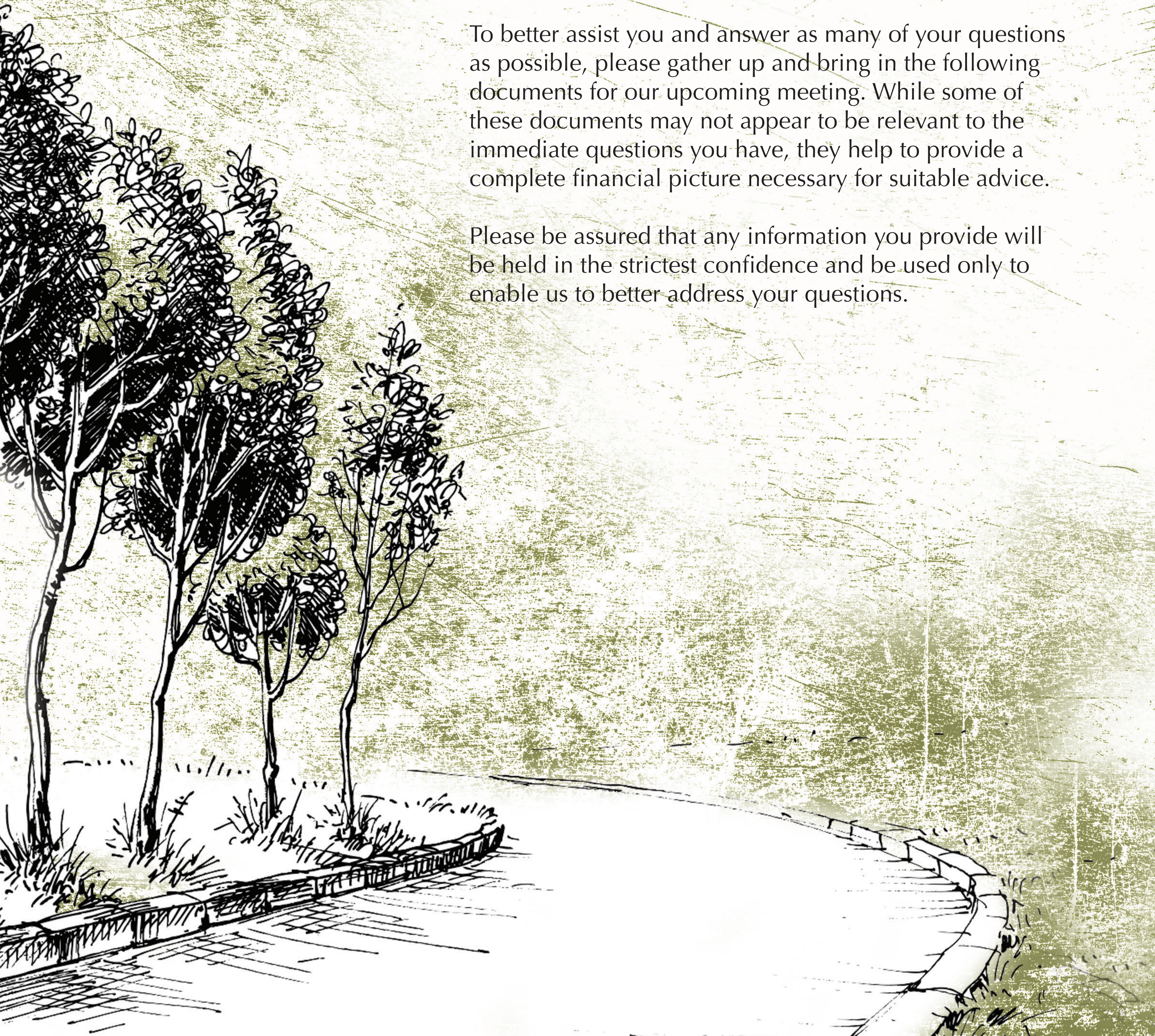
Our mission is to help you see what's down each path, and the risks associated with each one.

We're here to guide you on whatever path you choose.

Finding Your Path

To better assist you and answer as many of your questions as possible, please gather up and bring in the following documents for our upcoming meeting. While some of these documents may not appear to be relevant to the immediate questions you have, they help to provide a complete financial picture necessary for suitable advice.

Please be assured that any information you provide will be held in the strictest confidence and be used only to enable us to better address your questions.



Pieces of the Map

Please bring as many of the following documents (pieces) to our meeting that you can find:

Income Related

- Latest Income Tax Return
- Recent Paystub(s)

Debt Related

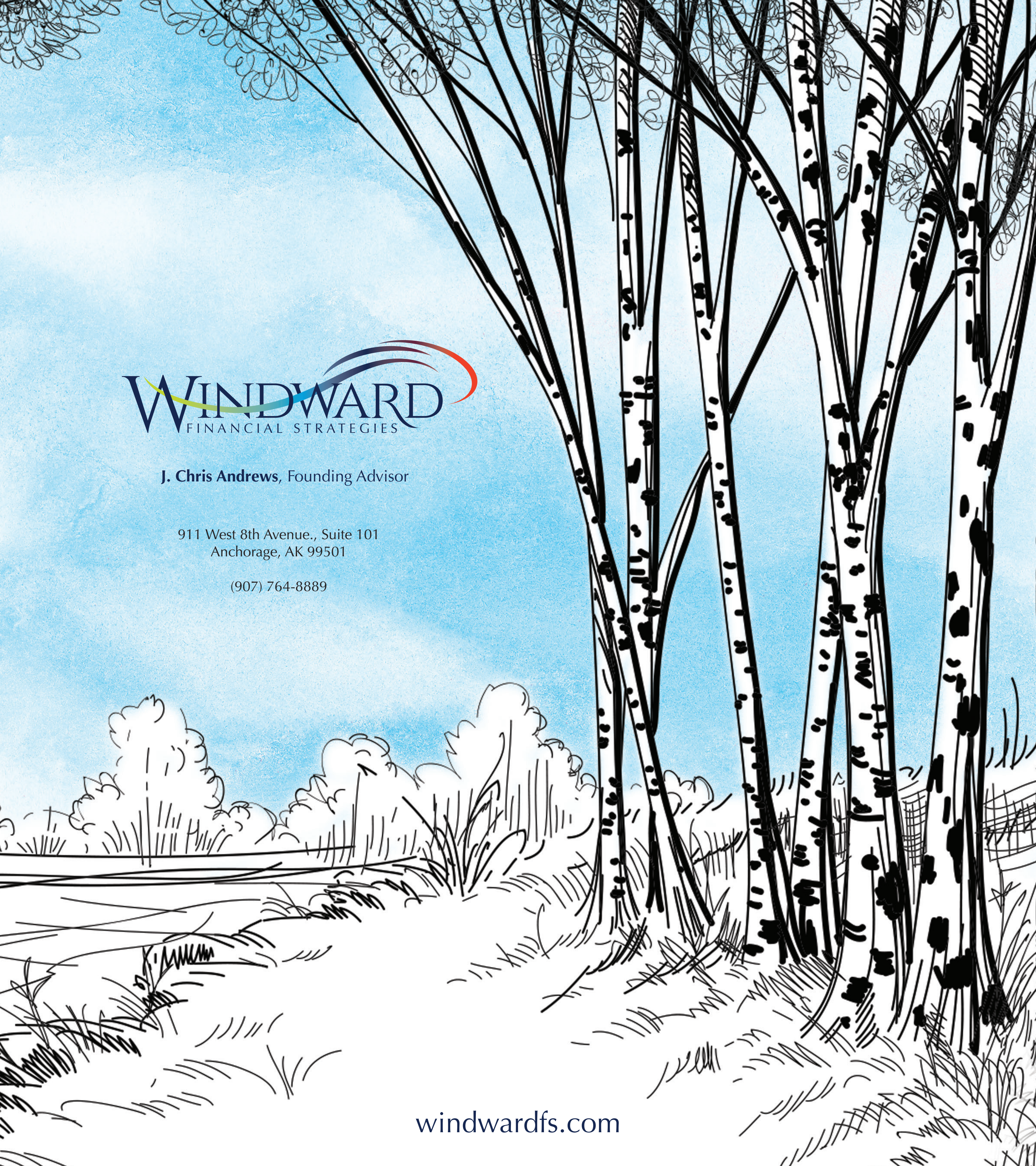
- Mortgage and other loan statements and documents (auto, student loans, etc.)
- Credit Card Statements
- A listing of, or statements from, any other significant debts or obligations

Asset Related

- Employer Retirement Account or Pension statements including 401k, 403b, 457, or other pension/savings accounts.
- Personal retirement account statements, including IRA's and ROTH IRA's.
- Investment account statements, including mutual funds, annuities, or brokerage accounts.
- Valuation estimates of real estate and investment property holdings.
- A list of, or statements from, other significant assets (valuable collections, "toys" etc.)

Planning Related:

- Employee benefits booklet
- Copies of Wills or Trusts
- Life, Disability and Long-Term Care, Insurance policy information and statements
- Health and Disability Insurance policy information



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