



HOOVER

FINANCIAL GROUP

= SINCE 1983 =

DOCUMENTS NEEDED FOR DISCUSSION

- Tax Return – last year's
- Pay Stub – most recent
- Social Security Statements
- Retirement Account(s) statement(s) – most recent
- Savings Account(s) statement(s) – most recent
- Checking Account(s) statement(s) – most recent
- Other Investment Statements –
 - IRA(s)
 - Real Estate
 - Other: _____
- Life Insurance Policy(s) or statement(s)
- Disability Insurance Policy(s) or statement(s)
- Group Benefits statement(s) -
 - Disability
 - Life
 - Other: _____
- Umbrella Insurance Policy – most recent
- Mortgage statement(s)
 - Balance:
 - Interest Rate:
 - Loan Conditions:
 - Payment:
- Cash Flow Analysis completion
- Children's account(s) statement(s)
- Will(s)/Trust documents
- Beneficiaries on all Retirement Accounts

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HOOVER FINANCIAL GROUP IS INDEPENDENTLY OWNED AND OPERATED FROM NYLIFE SECURITIES LLC AND ITS AFFILIATES.