



# HOOVER

FINANCIAL GROUP

— SINCE 1983 —

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## DOCUMENTS NEEDED FOR DISCUSSION

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- 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