Hoover Financial Advisors, PC

Solid... Secure... Timeless...
Your Bridge to the Future

# Initial Document Checklist

For the data gathering meeting, please assemble the following documents. All original documents will be returned at the financial plan delivery meeting. Please make copies of any documents that cannot be left with our office during the plan preparation.

- ❑ Tax Returns: copies of the last two years of returns (both Federal and State)

- ❑ Wills, Trust Documents, and Powers of Attorney

- ❑ Life, Disability, & Long-Term Care Insurance
  - ❑ Copy of Policy(ies)
  - ❑ Latest Premium Notice(s)

- ❑ Investment Accounts: most recent statements
  - ❑ Individual/Brokerage Accounts
  - ❑ Employer-Sponsored Retirement Plan (including investment options available)
  - ❑ Individual Retirement Accounts
  - ❑ Thrift Plan (including investment options available)
  - ❑ Checking/Savings Accounts
  - ❑ Annuities (qualified and non-qualified)

- ❑ Pension Benefit or Profit Sharing Plan Statements

- ❑ Consecutive Pay Stubs: 4 if paid weekly, 2 if paid bi-weekly/semi-monthly, 1 if paid monthly

- ❑ Social Security Statements (can be obtained at www.ssa.gov)

- ❑ Booklets describing employee benefits such as disability, life insurance, and medical

<u>If Applicable</u>

- ❑ Deferred Compensation: most recent statement and any additional information

- ❑ Stock Options/RSUs: most recent statement