HATHAWAY
FINANCIAL GROUP

Meeting Preparation Checklists

New to HFG? Your time is valuable, and we prefer to spend that time getting to know you. The following checklists are designed to make the best use of our time together by helping you gather information *before* we meet.

Discovery Meeting [To Develop Your Financial Plan]

- Completed HFG Financial Plan Info form
- Recent paystubs
- Residence/real estate information [value, balance owed, interest rate]
- Recent statements for accounts [bank, investments, retirement accounts, etc.]
- Life insurance policies and statements
- Goals [home improvements, vacations, college funding, retirement at a specific age]
- Questions about us or our process.

Realization Meeting [To Implement Plan Recommendations]

- Social Security numbers for all accountholders
- Dates of birth for all accountholders
- Copies of driver's licenses for all accountholders
- Social Security numbers for all beneficiaries
- Dates of birth for all beneficiaries
- Addresses of all beneficiaries
- Mother's maiden name or code word [for on-line access security]
- Voided check for automatic contribution plans
- Retirement plan distribution/rollover paperwork or call-in/ log-in instructions from your plan administrator [for job transitions and retirement].

Already working with us? It is important for us to monitor your progress and stay on track.

Plan Updates and Portfolio Reviews

- Updated income and monthly expense figures
- Updated [non-Money Concepts] assets and liabilities [balance, interest rates, payments]
- Recent paystubs if income or deductions have changed
- Any other changes in your life we should know about [job, home, family, health]
- Names and contact information for your referrals
- Completed survey [if you have not already done so this year]
- Completed in-service rollover [if eligible]
- Questions.