



The Benefits Of Account Aggregation

Good financial planning means taking into account the entirety of a person's finances. At Hanover, we care about more than just the accounts you have with us. We know that these accounts are simply one part of your larger financial portfolio, and want to ensure that all of your accounts are working in unison to provide you with the best value and are helping to achieve your financial goals.

To that end, we offer our clients an account aggregation service, which allows us to collect financial information from all of your various accounts, even if they are held at different institutions. This enables us to present our clients with a consolidated financial report that shows the entirety of their financial holdings. This report is an important tool in developing and coordinating an overall investment strategy and optimizing your various investments so that they can achieve their maximum growth potential.

You likely have a variety of holdings spread out across many institutions. These could include retirement accounts, such as a 401(k) through your employer, an education account, like a 529 Savings Plan, brokerage accounts like a trust or IRA, or even just a savings account with your bank. In aggregating these all together, we can provide a fuller picture of your overall financial health. Factoring in the entirety of your finances will allow us to better help you tailor a financial plan and more directly target your investments to ensure your financial goals are met.