WELLS FARGO Advisors

Wealth Planning Check-In for Emerging Professionals & Growing Families

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Setting Direction

My current priorities include:

☐ Building emergency savings
☐ Managing or reducing debt
☐ Saving for a home or major purchase
☐ Advancing my career or income
☐ Balancing today’s lifestyle with future goals

Long-term goals I’m thinking about:

☐ Retirement savings
☐ Financial independence

☐ Education planning
☐ Flexibility for life changes
☐ Supporting family over time

Saving & Investing Foundations

☐ I am contributing to retirement accounts
☐ I understand how much I should be saving
☐ My investments align with my goals and time horizon

Accounts I currently use:

☐ Workplace retirement plan
☐ IRA / Roth IRA
☐ Brokerage or savings accounts

☐ I would benefit from a clearer investment strategy and structure

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Market Understanding & Comfort Level

☐ I understand basic market concepts
☐ I feel comfortable with my current risk level
☐ I know how my investments may behave in different markets

Topics I want to better understand:

☐ Investing basics
☐ Market downturns and long-term planning
☐ Tax-efficient saving and investing

Family & Future Planning (if applicable)

☐ Planning for children or education is important to me
☐ I understand available education savings options
☐ I want my wealth plan to adapt as my life changes

What I Value in an Advisor

☐ Clear, honest communication
☐ Guidance aligned with my values

☐ Education and long-term perspective
☐ A relationship that evolves over time

Confidence in my financial direction (1–10, 10 being the most confident): ____

Reflection

☐ This review helped clarify my priorities
☐ I know others who may be navigating similar questions

Being informed and proactive can make a meaningful difference over time.