

Understanding what's important to you

Name _____ Age _____ Date _____

Please share what goals are important to you. What is driving your financial purpose and priorities?

- | | | |
|--|---|---|
| <input type="radio"/> Make a big purchase | <input type="radio"/> Pursue travel and leisure | <input type="radio"/> Buy a home |
| <input type="radio"/> Prepare for emergencies | <input type="radio"/> Prepare for retirement | <input type="radio"/> Start or buy a business |
| <input type="radio"/> Manage or transition a business | <input type="radio"/> Build and protect wealth | <input type="radio"/> Manage credit and debt |
| <input type="radio"/> Explore tax planning strategies* | <input type="radio"/> Manage spending | <input type="radio"/> Support my family |
| <input type="radio"/> Provide for education | <input type="radio"/> Focus on health care | <input type="radio"/> Engage in giving and philanthropy |
| <input type="radio"/> Align investing and values | <input type="radio"/> Provide for peace of mind | <input type="radio"/> Make legacy and estate plans |

*Wells Fargo and Company and its Affiliates do not provide tax advice. This communication cannot be relied upon to avoid tax penalties. Please consult your tax and legal advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your own situation at the time your tax return is filed.

Please share your perspective on the following:

Strongly agree Agree Neutral Disagree Strongly Disagree

- | | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I am confident in my ability to understand my finances and investments. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am optimistic about the economy and markets now and in the future. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I want to be actively involved in the day-to-day decision making surrounding my finances and investments. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am clear about my financial goals and how my current situation supports those goals. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I have specific goals to support and care for my loved ones. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I feel I have enough to achieve my goals now and in the future. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I have plans for giving to my family or community. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

At this time, how much money have you accumulated to support your goals?

- \$0 – \$100 \$100 – \$250,000 \$250,000 – \$1,000,000 \$1,000,000 – \$10,000,000 \$10,000,000+

How much are you currently contributing toward saving or investing on an annual basis?

- \$0 – \$100 \$100 – \$1,000 \$1,000 – \$10,000 \$10,000 – \$100,000+

Who are the important family members and individuals to be considered in your financial decisions?

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- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested