WELLS FARGO Advisors

Your plan process

Checklist

Things to bring with you:

- ❑ **Investment accounts (excluding Wells Fargo Advisors accounts)**
  Current statements showing value and positions (stocks, bonds, mutual funds, CDs, money markets, etc.)
- ❑ **Bank accounts**
  Current statements showing value and positions (CDs, money markets, etc.)
- ❑ **A list of your other assets**
  Current statements showing value, if available (homes, personal property, rental property, collectibles, etc.)
- ❑ **A list of your liabilities**
  Current statements showing value, if available (debts, mortgages, loans, etc.)
- ❑ **Insurance policies**
  Life, long-term care, etc.
- ❑ **Social Security information**
  Statements you may have received with an estimate of earnings at retirement.
- ❑ **Current contributions**
  401(k)s, IRAs, savings accounts, etc.
- ❑ **Annuity information**
  Cash flows, income, savings, etc.
- ❑ **All sources of income**
  Salaries, pension plans, trust funds, rental income, etc.

Questions I will ask you:

- **When do you and your spouse/partner want to retire?**
- **How much money will you need to live on at retirement?**
- **What are your goals?**
  (travel, new cars, boat, vacation home, etc.)
- **Do you anticipate any inheritances?**
- **How will medical costs impact your plan?**
- **How would you fund an emergency or unexpected need?**
- **Do you plan to make any major purchases within the next 12 months?**

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