

POMFRET & TELLJOHANN  
WEALTH MANAGEMENT GROUP  
*of Wells Fargo Advisors*

## Client Emergency Reference Kit

This kit contains an organized summary of your vital information in case of an emergency.

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**Investment and Insurance Products are:**

- Not Insured by the FDIC or Any Federal Government Agency
- 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

# Account Information & Liability Review

## Employer Sponsored Plans

*Retirement plans at your current or former employer*

Plan Type	Assets	Phone Number	HR/Benefits Rep Name
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## Other Retirement Accounts & Pensions

*IRAs, Roth IRAs, Rollover IRAs, any other individual retirement accounts, trust accounts, etc.*

Account Type	Assets	Phone Number	Contact/Advisor Name
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## Other Non-Retirement Investment and Bank Accounts

*Investment, small business accounts, college savings, 529, bank, CD, savings, checking accounts*

Account Type	Assets	Phone Number	Contact/Advisor
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## Business Ownership Information

*Business name, legal business designation, main office address and your ownership value*

Business Name	Type (Corp, LLC, etc.)	Address	Ownership Value
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# Account Information & Liability Review

## Home/Real Estate

*Real estate information, type address and full property value - loan information is below*

Real Estate Type	Address	Value
Primary Residence		
Secondary Residence		
Business		
Rental/Other		

## Automobiles/Boat/RV

*Vehicle information, make, model, year and overall value, loan information is below*

Vehicle	Make & Model	Value
Auto 1		
Auto 2		
Other		
Other		

## Loans/Mortgages/Home Equity

*loans, mortgages, home equity, personal loans, student loans, automobile, boat, RV, etc.*

Loan Type	Principle Remaining	Years Remaining	Mortgage Servicing Company
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## Credit Cards

Card Type	Balance	Issuer	Phone
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# Estate Planning Information

## Estate Planning Attorney

Contact information for attorney who prepared your estate planning documents - will, power of attorney, healthcare proxy, living will, etc.

Name	Phone	Email
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Place an x next to the documents prepared - fill in other additional documents

x	Document Prepared	Location
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- Will
- Power of Attorney for financial matters
- Power of Attorney for healthcare matters
- Trust

## Other Attorneys

Contact information for attorneys who prepared any other services for you, divorce, trust, etc.

Name	Phone	Email	Document Prepared
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Wells Fargo Advisors is not a legal or tax advisor. However, we will be glad to work with you, your accountant, tax advisor and or lawyer to help you meet your financial goals.

# Protection & Insurance

## Insurance Protection

*Insurance policies and your representative's contact information*

Insurance Type	Agent/Representative	Email	Phone Number
Home Owners			
Life			
Life			
Life			
Long Term Care			
Liability/Umbrella			
Auto			
Business			

## Group/Employer Insurance Protection

*Insurance you receive through your employer and your human resources or benefits coordinator's contact information*

Insurance Type	HR/Benefits Representative	Email	Phone Number
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Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

# Tax Planning

## Tax Planning

*Personal,  
business tax  
returns, quarterly  
filings, estate  
taxes, filings, etc.*

Accountant/CPA	Email	Phone	Documents Prepared
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## Location of Past Years Tax Records

Description of location
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Wells Fargo Advisors is not a legal or tax advisor. However, we will be glad to work with you, your accountant, tax advisor and or lawyer to help you meet your financial goals.

# Emergency Information

Retain for your records - do not return to your advisor

## Doctors

*Information for your primary care physician and any specialists*

Type of Physician	Name	Location	Phone Number
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## Closest Relatives & Friends Not Living With you

*Names and contact information for people closest to you*

Name	Relationship	Email	Phone Number
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## Safety Deposit Box

*Address, location and contact information to be able to locate and access your box(s)*

Bank Name	Contact	Address
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# Emergency Information

Retain for your records - do not return to your advisor

## Location of Cryptocurrency Application

Location
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## Funeral/Final Arrangements

	Name/Contact	Location	Phone Number
Place of worship			
Funeral arrangements			
Burial/Cemetery			
Other Information			

## Other items to consider documenting and keeping with your important papers:

- List of all account sign-in IDs and passwords/PIN numbers
- Location and access code for home lock box and/or safe
- Inventory of any antiques, collectibles, jewelry, artwork, etc.
- Copies of drivers license and passport