POMFRET & TELLJOHANN WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors

Planning Checklist: Next Generation Planning

When it comes to starting out, we understand it can be a challenge with so many

demands on your time and attention. Starting early and organizing your planning is a great way to start.

Create a detailed budget
Itemize all assets & liabilities
Review your investments, account types and titling
Itemize all debts including principle, interest rates, term and payment schedules
Identify short and long term savings goals
Explore options for refinancing or consolidating debts
Enroll and take full advantage of your employer sponsored retirement plan
Identify insurance coverages, type, amount, waiting periods, etc.

2350 West Joppa Road, Lutherville, MD 21093 | 410.494.6870 james.pomfret@wfadvisors.com | sarah.telljohann@wfadvisors.com

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

Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. ©2022 Wells Fargo Clearing Services, LLC. PM-04102025-6010464.1.1