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.

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