

Wealth Profile

Household

Name	Occupation	Age	Birthday

Beneficiaries and Dependents	Relation	Age	Birthday

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

Goals

Lifestyle

Set goals related to how and where you live, your lifestyle and preparing for emergencies.

Goal	Description	Amount	Target Date	Priority
After tax living expenses				
Big Purchase(s)				
Travel and leisure				
Home purchase				
Emergencies fund				
Other				

Family

Set goals related to providing for your loved ones during your lifetime and helping them to live their best lives.

Goal	Description	Amount	Target Date	Priority
Family support				
Provide for education				
Provide health care				
Cover special needs				
Other				

Career

Set goals related to where and how you work, while planning for what retirement means to you.

Goal	Description	Amount	Target Date	Priority
Income				
Change roles				
Start or purchase a business				
Business transition				
Retirement				
Other				

Wealth

Set goals related to managing your finances strategically.

Goal	Description	Amount	Target Date	Priority
Manage spending				
Build wealth				
Protect income and assets				
Manage credit and debt				
Tax planning strategies				
Other				

Legacy

Set goals related to ensuring your values and wishes are reflected in your finances.

Goal	Description	Amount	Target Date	Priority
Charitable giving				
Values-based investing				
Estate planning				
Other				

Wells Fargo Advisors and its affiliates do not provide legal or tax advice. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.

Risk Tolerance

My willingness to take risk is:

- Conservative Moderately conservative Moderate Moderately aggressive Aggressive

If my portfolio value declined significantly, I'd be most likely to:

- Cash out Get more conservative Wait it out Get more aggressive Invest cash

Taxes

Filing Status:

- Married taxpayer filing jointly
 Single taxpayer
 Head of household
 Married taxpayer filing separately

Federal Marginal Tax Rate:

- 10% 32%
 12% 35%
 22% 37%
 24%

State: _____

Personal Income Statement

Estimate your current and future sources of income and expenses to understand your net income.

Item	Description	Amount	Notes
Income			
Earned income			
Earned income			
Business income			
Social Security			
Social Security			
Other			
Expenses			
Fixed expenses			
Variable expenses			
Discretionary expenses			
Liability payments			
Saving and investments			
Other			
Net income			

Personal Balance Sheet

Estimate your account balances to understand your current net worth.

Item	Description	Balance	Notes
Assets			
Cash			
Traditional retirement accounts			
Roth retirement accounts			
Taxable investment accounts			
Real assets			
Other			
Liabilities			
Credit cards			
Loans and lines of credit			
Mortgages			
Other			
Net worth			

Investment Objectives

Describe your investment objectives and allocations to equities, fixed income, cash and alternative investments.

Business Ownership

Describe any businesses ownership interests.

Insurance Information

Describe any current insurance policies, including life, disability, long-term care, medical, homeowners, etc.

Estate Planning Documents

Describe any current estate planning documents, including wills, trusts, beneficiaries, etc.

Preferences

Rank your preferences for working with a financial advisor on the following spectrums:

- | | | | | | | |
|------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| More contact with my advisor | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Less contact with my advisor |
| Collaborate on financial decisions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Delegate financial decisions |
| More detailed explanations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Less detailed explanations |
| More technology | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Less technology |
| Try complex financial strategies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Keep my financial strategies simple |

Other Considerations

Describe any other considerations not otherwise specified.

Action Items

List any action items to work toward aligning your goals with your finances.

Name	Description	Target Date

This profile is not complete without, has not been extracted from, and does not replace, the information provided during account opening. Please notify your Financial Advisor if any updates are required. If there are any discrepancies between this document and the information we have on file, the information contained in your account opening forms will take precedence.

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