

The Envision® 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

Homes, personal property, rental property, collectibles, etc.

A list of your liabilities

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?

Together we'll go far



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Investment and Insurance Products: ▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value

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