

THE SCHULTEN GROUP

of Wells Fargo Advisors

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Understand Your Goals

We will conduct a personal interview with you to best understand your most important goals and gather other pertinent information. If appropriate and with your consent, we also consult with other professional advisors, including your legal and tax advisor, to understand all pertinent details of your financial circumstances.

CHECKLIST:

Gather these materials whether you are updating or creating your personal plan so that your team at The Schulten Group has all the information needed for a thorough understanding of your financial situation.

Investment 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.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC.