eMoney Investment Plan Preparation

What to provide:

- Check Stub or Annual Income
- Most recent Tax Return
- Social Security Statement (www.ssa.gov) or S.S amounts at age you'd like to retirement
- Any retirement plan ***statements***, insurance policies, or other information you would like us to review

Information to consider:

- Monthly or annual living expenses? ____________________
  - Does this include property taxes?
- What are your assets and their current value? (Savings, retirement accounts, investment accounts, land, house, etc.) *Do not have to include accounts with us at Wells Fargo
  ____
- What liabilities do you have? (Auto loans, mortgage, credit cards, etc.)
  - What is the length of the loan and interest rate
- Annual savings? _________________
- Retirement contributions and match? _________________
- What is your current age and what is your ideal retirement age? _________________
- What is your current annual income? _________________
- What is your ideal retirement income? _________________
- What insurance coverage do you have? What is the cost? (Medical, Life, Disability, LTC)
  ____
- Do you have any major goals you want to plan for? (Education, wedding, home improvement, new car purchase, travel, etc.)
- Any income sources not previously mentioned? (Pensions, inheritances, etc.)