

Current Home Value \$ _____

Mortgage Balance \$ _____

Interest Rate _____%

Estimated Pay-off Date _____

Do you intend to sell? Yes No

When? _____

Home Equity Loan Balance \$ _____

Interest Rate _____%

Other Debt \$ _____ Interest Rate _____%
(Credit card, Car loan, etc.)

Other Property Value \$ _____

(Rental, Vacation, Raw Land, etc.)

Mortgage Balance \$ _____

Interest Rate _____%

Do you intend to sell? Yes No

When? _____

If yes, estimated *after-tax* gain \$ _____

Home Equity Loan Balance \$ _____

Interest Rate _____%

ADDITIONAL INCOME SOURCES

Employment After Retirement \$ _____ **Beginning Age** _____ **Ending Age** _____
(Annual, Before-tax)

Other Income \$ _____ **Beginning Age** _____ **Ending Age** _____
(Pension, Rental Income, etc.)
(Annual, Before-Tax)

Adjusted **annually** for inflation? Yes No

Spouse's Retirement Benefits \$ _____ **Beginning Age** _____ **Ending Age** _____
(Pension, Lump-sum, etc.)
(Annual, Before-tax)

Adjusted **annually** for inflation? Yes No

Social Security Income \$ _____ **Beginning Age** _____ **Ending Age** _____
(Monthly - Before Taxes)

Spouse's Soc. Security Income \$ _____ **Beginning Age** _____ **Ending Age** _____
(Monthly - Before Taxes)

Inheritance, legal settlement, etc. \$ _____ **Beginning Age** _____ **Ending Age** _____
(After Taxes)

Anticipated annual AFTER-TAX income needs at retirement from all sources \$ _____

ESTATE PLANNING: Passing on your retirement assets to your beneficiaries is of great importance to some retirees, but not so to others. How important to you is estate planning or passing on your assets to future generations?

Very Important Somewhat Important Not Motivated Either Way Not Important

Do you have a living trust? Yes No Last Updated _____

Do you have a will? Yes No Last Updated _____

Do you have children? Yes No How many? _____ Ages? _____

This questionnaire is for informational gathering purposes only. If you become a client of Wells Fargo Advisors, you will receive official account opening documents that will address numerous items including your tolerance for risk. The information contained in the official account opening documents will supersede this questionnaire.

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