WELLS FARGO Advisors

Any Questions? Call (949) 862-1233 WELLS FARGO Advisors

Retirement accounts inventory

Please provide the most current information on your employer-sponsored plans and IRAs to assist us in addressing your retirement needs. Please include all annuities, pensions, employer sponsored plans, such as 401(k), 403(b), governmental 457(b), as well as Traditional, Roth, SEP, and SIMPLE IRAs.

At Wells Fargo Advisors, we strive to bring value-added services to our clients and prospects. This retirement accounts inventory will help provide a consolidated view of your retirement assets. It can help us assess where you are in terms of meeting your financial goals whether you are still saving for retirement, are preparing to retire in the near future, or have already retired.

Additionally, we can better advise you on financial strategies like asset allocation, and beneficiary planning, or the calculation of required minimum distributions (RMDs) with this inventory.

Name

Address

Date of birth

Phone number

Name of account holder

Firm/institution

Account type

Account value as of 12/31

Name of account holder

Firm/institution

Account type

Account value as of 12/31

Name of account holder

Firm/institution

Account type

Account value as of 12/31

Name of account holder

Firm/institution

Account type

Account value as of 12/31

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