




# What's important to you?

## Managing your money







**New to Wells Fargo?** We can help you get started.

**Already a customer?** Let's check-in and make sure you have what you need.

Access	Information	Protection
<p>Access to your money for payments and purchases.</p> 	<p>Information about your money so you can make good decisions.</p> 	<p>Protection for your money and information.</p> 

## Your financial priorities

What are your priorities now and in the future? Please write a 1 and 2 in any of the boxes below to indicate your top two. Add more if you have other priorities you would like to discuss.

<p><input type="checkbox"/> <b>Saving</b></p>  <ul style="list-style-type: none"> <li>• College/education</li> <li>• Grow savings</li> <li>• Home improvement</li> <li>• Unexpected expenses</li> <li>• Vacation</li> <li>• Wedding</li> </ul>	<p><input type="checkbox"/> <b>Borrowing<sup>1</sup></b></p>  <ul style="list-style-type: none"> <li>• Auto purchase/refinance</li> <li>• Build/manage credit</li> <li>• College/education</li> <li>• Credit card</li> <li>• Debt consolidation</li> <li>• Emergencies</li> <li>• Home improvement</li> <li>• Start a business</li> </ul>	<p><input type="checkbox"/> <b>Home<sup>1</sup></b></p>  <ul style="list-style-type: none"> <li>• Home improvement</li> <li>• Purchase a home</li> <li>• Refinance an existing home loan</li> <li>• Use home equity</li> </ul>
<p><input type="checkbox"/> <b>Insurance*</b></p>  <ul style="list-style-type: none"> <li>• Auto</li> <li>• Home</li> <li>• Life</li> <li>• Renters</li> </ul>	<p><input type="checkbox"/> <b>Investing**</b></p>  <ul style="list-style-type: none"> <li>• Get investment advice</li> <li>• Invest for education expenses</li> <li>• Learn about investments</li> <li>• Make my own investments</li> </ul>	<p><input type="checkbox"/> <b>Retirement**</b></p>  <ul style="list-style-type: none"> <li>• Calculate my retirement savings goal</li> <li>• Generate retirement income</li> <li>• Nearing retirement check-up</li> <li>• Saving for retirement</li> <li>• Transfer an existing IRA or 401(k)</li> </ul>

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

<sup>1</sup> All credit and lending decisions subject to approval.

\*Wells Fargo Insurance, Inc. is a licensed agency that represents — and is compensated by — the insurer based on the amount of insurance sold.

\*\*Brokerage products and services are offered through Wells Fargo Advisors, LLC, Member SIPC, a registered broker-dealer and separate non-bank affiliate of Wells Fargo & Company. Investing involves risk, including the possible loss of principal.

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LENDER Printed materials expire on December 31, 2016. MKT14755 (Rev 02-03/16) ECG-2326801