

Valtierra Investment Group would love to help you and your family with your financial stewardship.

Building a Strong Legacy - *Your Family and Your Assets*

How old are your wills, trusts, and estate plans?



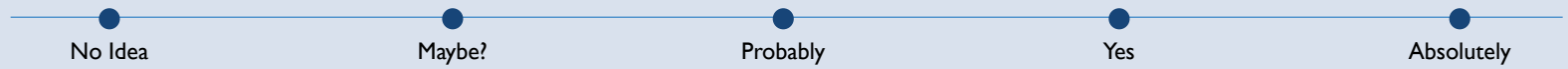
How strong would you rate your own estate plan (wills, trusts, etc.)?



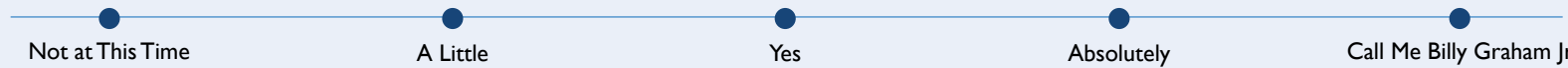
Do you know if your estate plan was drafted considering your state's laws?



Is your life insurance and savings enough to cover your family in an unexpected event?

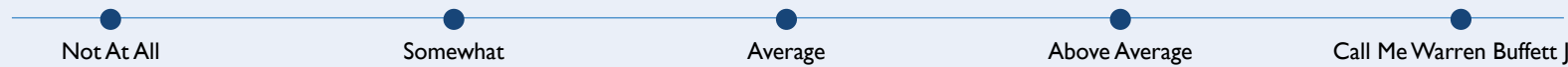


Is charitable giving a part of your estate plan?



Full Financial Physical - *A Check-Up for Your Wealth*

How well do you understand your investments?



Do you know the ratings of your investments?



Is your portfolio tax-optimized?



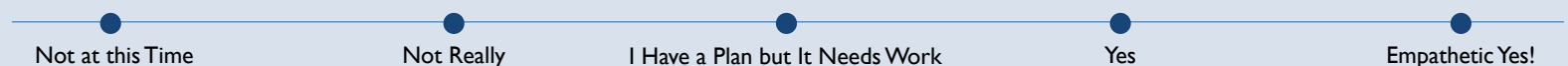
Do you know how much your investment management costs are?



Do you have a current investment retirement plan in place?

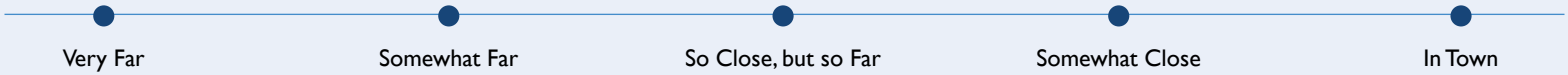


Would you benefit from a full review, including estate planning, elder care, and investment & retirement plan review?



Planning for Your Aging Parents - *Controlling the Chaos*

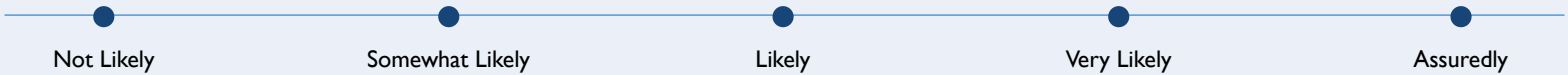
How close do you live to your parents?



In general, how strong is your communication with your parents regarding their estate plans?



Do you believe you'll have to care for an aging parent?



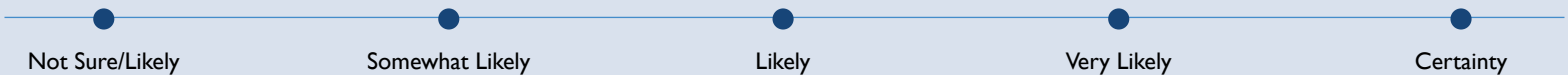
Will you (or have you already) been given Power of Attorney or a legally recognized position over an aging parent?



How involved have you been with your parents estate planning process (trust/wills/etc.)?



How likely are you to inherit property upon your parents' passing?



Comments

Name

Email

Address

City

State

Zip Code

Cell Phone

Best Time to Call or E-Mail?

Wells Fargo Advisors Financial Network is not a legal or tax advisor.