

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

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

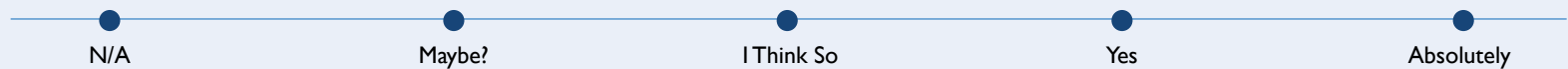
### How old are your wills, trusts, and estate plans?



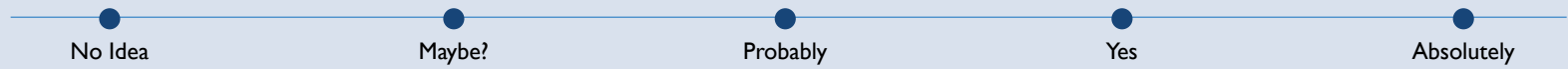
### How strong would you rate your own estate plan (wills, trusts, etc.)?



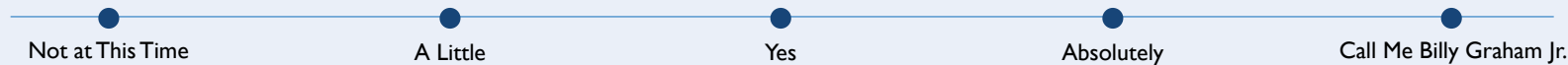
### Do you know if your estate plan was drafted considering your state's laws?



### 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?



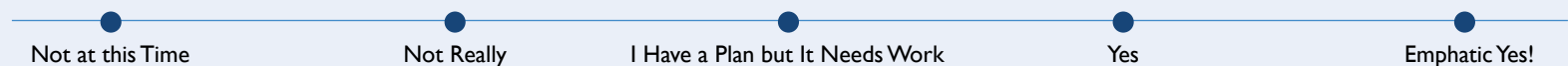
### Is your portfolio tax-optimized?



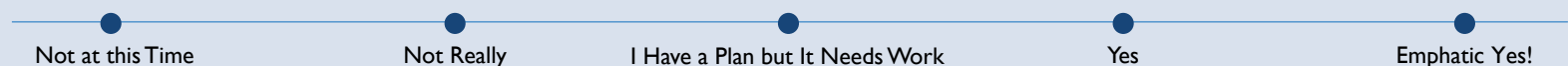
### Do you know how much your investment management costs are?



### Do you have a current investment retirement plan in place?

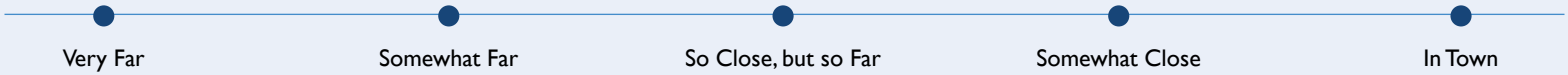


### Would you benefit from a full review, including estate planning, elder care, and investment & retirement plan review?



# Planning for Your Aging Parents - *Controlling the Chaos*

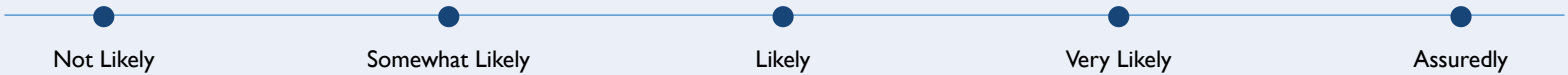
## How close do you live to your parents?



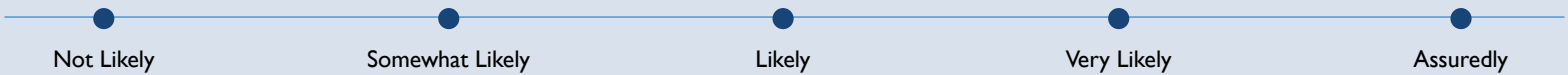
## In general, how strong is your communication with your parents regarding their estate plans?



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



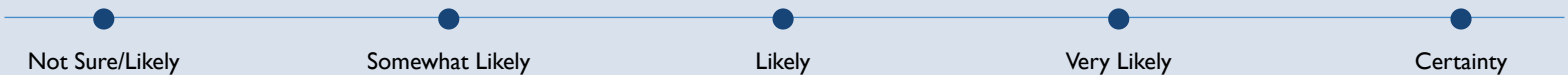
## Will you (or have you already) been given Power of Attorney or a legally recognized position over an aging parent?



## 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

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Name

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Email

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Address

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City

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State

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Zip Code

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Best Time to Call or E-Mail?

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