
Robert G. Petix, Jr. (“Bob”)

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Bob Petix is a private wealth strategist with Wealth & Investment Management located in the Southeast Florida Market. Bob is part of a team that works locally with high and ultra-high net worth clients by collaborating with their advisors to review, develop, and consult on wealth transfer planning, taking into consideration tax efficiency, family legacy, philanthropy, business succession, asset protection, and other factors. Specifically, Bob works with advisors and their clients to understand each client's goals and objectives. He reviews and analyzes the current wealth plan and helps to identify additional strategies or adjustments to existing plans that can improve the likelihood of achieving the client's overall goals.

Prior to joining Wells Fargo, Bob practiced law for more than two decades in the area of Trusts & Estates. He was a partner at a large law firm located in New England before coming to Wells Fargo. Bob has seven years of experience in financial services.

Bob earned a Bachelor of Arts in English literature from Columbia University. He also earned his Juris Doctor (not currently practicing) from the University of Georgia School of Law, graduating Magna Cum Laude.

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