WELLS FARGO Wealth & Investment Management

Specialized wealth services

Offered through Wells Fargo Bank, N.A.

Comprehensive strategies for your wealth and legacy

Custom Lending

Exclusive lending solutions tailored to the financial needs of affluent individuals and families. From financing acquisitions to accessing liquidity for strategic planning, our bespoke strategies deliver the flexibility required to achieve your wealth objectives.

Cash Management Solutions

Comprehensive cash management strategies to optimize financial resources and enhance liquidity. Our solutions are designed to simplify daily financial activities, streamline payments, and ensure seamless integration with broader wealth planning goals.

Executive Planning

Customized support for business leaders to optimize equity benefits, navigate stock strategies, and enhance financial planning. This comprehensive approach simplifies complex compensation structures and aligns financial goals for long-term success.

Trust and Estate Planning

Offering solutions designed to protect your legacy, support your loved ones, and meet a variety of complex planning needs, including special needs trusts. Our expertise helps ensure your assets are managed according to your wishes.

Comprehensive Wealth Planning

Personalized strategies to manage, preserve, and transition wealth, tailored to your unique goals and priorities. This includes ongoing stewardship of specialty assets, such as real estate and business interests.

Business Owner Advisory Services

Comprehensive support for managing, valuing, and transitioning privately held companies. From strategic planning to succession, we help navigate complexities and secure your legacy.

Insurance Services

Customized insurance solutions designed to protect wealth, support estate planning, and provide financial security for future generations.

Outsourced Chief Investment Officer (OCIO)

Providing investment management and value added services to help nonprofits realize their mission and vision.

Alternative Investments

Access a diverse range of nontraditional investment opportunities designed to enhance portfolio growth, manage risk, and align with your financial goals.

Family Wealth & Culture Services

Advises families on navigating generational wealth, fostering a legacy of financial stewardship and preserving values across generations.

Portfolio Management

Deliver tailored investment strategies designed to grow, protect, and align with your family's long-term financial goals and objectives.

Philanthropic Services

Tailored solutions for individuals and tax-exempt entities that align with their charitable and nonprofit goals.

Specialized wealth services

Key questions to guide your wealth journey

Custom Lending Solutions

- Are your current financing strategies fully maximizing the potential of your assets?
- Do you hold assets or investments that are illiquid or that you prefer not to sell?
- Could borrowing against these assets provide the additional liquidity needed to bring your plans to life?

Cash Management Solutions

- Are your cash management strategies optimized for seamless daily operations and liquidity?
- How can enhanced cash flow solutions support your broader wealth planning goals?
- What steps could you take to align your financial resources with future opportunities?

Executive Planning

- Are your equity benefits and stock compensation working as hard as you are?
- Could personalized financial strategies help you maximize your executive compensation?
- Are you prepared to align your financial goals with long-term success and confidence?

Trust and Estate Planning

- How can I protect my legacy and ensure it's passed on efficiently?
- How do I support loved ones, including those with special needs?
- How can I align my wealth and philanthropic goals while managing taxes?

Comprehensive Wealth Planning

- How can comprehensive wealth planning align your financial goals with long-term aspirations?
- What strategies help ensure cohesive wealth management across all areas?
- How can comprehensive planning address both current needs and future objectives?

Business Owner Advisory Services

- What is my company worth today?
- Would I consider selling, and is now a good time?
- What are my transition options, and the pros and cons of each?

Insurance Services

- Have you effectively integrated your insurance coverages to meet your financial goals?
- When was the last time you had your insurance coverages reviewed to make sure they align with your financial goals?
- Have changes in income, estate or gift tax legislation impacted your financial planning with respect to your insurance coverages?

Outsourced Chief Investment Officer (OCIO)

- Is your Investment Policy Statement consistent with industry best practices?
- Do you have the appropriate asset allocation to meet your current and future spending needs?
- Do you have questions about the role alternative investments might play in a portfolio?

Alternative Investments

- Do you have any investing experience in alternative investments?
- Are you familiar with how they can help diversify your portfolio and potentially boost returns?
- Are you able to invest a portion of assets in a strategy that you can only redeem in quarterly, annual or 10-year periods?

Family Wealth & Culture Services

- How can I ensure shared values guide our financial decisions?
- What family stories will help the next generation understand the background of our family wealth?
- Is there a best way to approach conversations about money?

Portfolio Management

- How does your current portfolio fit with your long-term financial goals?
- Are you prepared to navigate market complexities while maintaining wealth stability?
- What strategies can help ensure your investments adapt to your family's evolving needs?

Philanthropic Services

- Do you have a strategy for managing your charitable interests?
- What inspires you to make a charitable gift? How can you maximize your philanthropic impact?
- How can strategic philanthropy support your wealth strategy and legacy?

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