WELLS FARGO Wealth & Investment Management

Supporting the growth of private company executives

Offered through Wells Fargo Bank, N.A.

Working with Wells Fargo Wealth & Investment Management means you have access to personalized advice tailored to your unique financial needs, from early liquidity management to long-term wealth preservation and legacy planning.

Early-stage liquidity | Pre-liquidity | Post-liquidity

Banking, Lending, and Trust Services

- Mortgage Finance
- Trust Services
- Private Stock Lending

Business

- Commercial Banking
- Investment Banking
- Retirement Plan Management

Planning

- Trust, Wealth and Tax Structuring
- Qualified Small Business Stock (QSBS) Income Tax Structuring
- Family Wealth Transfer Consulting
- Charitable Gift Strategies
- Risk Management and Insurance Assessment
- Equity Incentive and Succession Planning Guidance

Investment Management

- Cash Management
- Diversified Portfolio Management
- Executive Services
- 10b5-1 Programs
- Concentrated Stock Risk Management

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