

# 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
<b>Banking, Lending, and Trust Services</b>	Mortgage Finance		
	Trust Services		
	Private Stock Lending		
<b>Business</b>	Commercial Banking		
	Investment Banking		
	Retirement Plan Management		
<b>Planning</b>	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		
<b>Investment Management</b>	Cash Management		
	Diversified Portfolio Management		
	Executive Services		
	10b5-1 Programs		
	Concentrated Stock Risk Management		

**Investment and Insurance Products: Not FDIC Insured / No Bank Guarantee / May Lose Value**

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Trust Services are available through Wells Fargo Bank, N.A. and Wells Fargo Delaware Trust Company, N.A.

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