

# Our Firm



Home Office — St. Louis, MO

## A heritage of client service

Wells Fargo Advisors is one of the nation's premier financial-services firms. Represented by more than 11,000 financial advisors, it was born out of Wells Fargo & Company's 2009 acquisition of Wachovia Corporation.<sup>1</sup>

Wachovia Securities, LLC, which traced its roots to 1879, grew over the years through mergers with some of the industry's most respected regional and national firms, including the 2007 acquisition of A.G. Edwards, Inc., by Wachovia Corporation. Throughout their histories, Wells Fargo Advisors' predecessors were known for service based on trust and knowledge, and for corporate cultures that put client needs above all else.

## Our commitment to you

### We will honor our relationship with you:

When you work with a financial advisor from Wells Fargo Advisors, you have someone who takes the time to listen and understand your needs, helps you clarify your goals, and takes the safety and security of your money and investments seriously.

### We will be fully invested in your success:

Your financial advisor can help you stay on track to meet your goals through intelligent financial solutions, in-depth analysis of your investments, and regular feedback on your progress.

### We will be with you every step of the way:

Your needs and goals will change over time. That's why your financial advisor will be there to provide ongoing advice — along with the exceptional service you deserve — through the ups and downs of markets and economic cycles.

## Areas of distinction

- Unique structure that combines the capabilities of a large, national firm with the best practices of several smaller, esteemed firms
- Dedicated to financial advisors and their relationships with clients
- Exceptional choice and flexibility for financial advisors and their clients through distinct business channels supported by established products, services, and technology

## Products and services

- Asset management
- Banking and lending solutions<sup>2</sup>
- Education planning
- Estate planning strategies
- Investment planning
- Retirement planning
- Portfolio analysis

[wellsfargoadvisors.com](http://wellsfargoadvisors.com)

<sup>1</sup>All data include Wells Fargo Clearing Services, LLC (including its predecessor firms) and Wells Fargo Advisors Financial Network, LLC as of December 31, 2022.

<sup>2</sup>Through Wells Fargo affiliates.

**Investment and Insurance Products: • NOT FDIC Insured • NO Bank Guarantee • MAY Lose Value**