DAVIDSON
WEALTH MANAGEMENT
of Wells Fargo Advisors

Dear Friends and Clients,

We are pleased to introduce the newest member of Davidson Wealth Management of Wells Fargo Advisors:

> Tod E. Wells, CFP®, First Vice President and presently Branch Manager of Wells Fargo Advisors Davidson office.

Tod is an industry veteran who has served the last 10 years as our Qualified Supervisor, an important industry designation of regulatory supervision. In short, he has been an unofficial member of our team. We are pleased to make this official on February 1, 2022. In addition to his management responsibilities, Tod has over twenty years of experience serving complex investment needs of investors like you.

Our annual newsletter referenced our team members. Team member changes were the catalyst for our discussions with Tod. As a practice serving you, our clients, we are always looking for ways to improve. We are individuals serving collectively on your behalf as a team. Internally, we use the phrase "Corporate Athletes." This means that we each engage competitively on behalf of our clients, but behind-the-scenes, in the "locker room," we work collaboratively. We believe Tod is a solid "team player" who will bring additional value to our team and our clients as he aspires to serve. We expect that you will have opportunities to meet him almost immediately. Frankly, we cannot wait for you to meet Tod.

You may ask, "How does this impact me?" The first impact may be a mailing. Wells Fargo Advisors is required by industry standards to send you a form letter known as ADV Part 2B whenever there is a significant addition to a team. It may use language like "YOUR FINANCIAL ADVISOR HAS CHANGED or YOU HAVE A NEW FINANCIAL ADVISOR." This will be sure to get your attention, which is why we write to you in advance. The industry language can be confusing and sometimes unsettling.

The second impact is that temporarily, you may notice two names on your monthly statement or when you look at your accounts online: Davidson Wealth Management and Tod Wells. This is simply another industry regulation regarding transitions.

The biggest impact? A stronger team for you. Again, we cannot wait for you to meet Tod. He will be available as a valuable resource, assisting you and our team with financial advice, sound counsel and administrative savvy.

Sincerely,

Christopher M. Senvisky, CFP®, RICP®
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