WELLS FARGO Advisors

Your Guide to Wealth Management

J. Greg Paffendorf Sr., CFP®, CPWA®, CEPA®
Managing Director - Investments
Wells Fargo Advisors

Tel: 858.261.6343 | Cell: 619.964.8281
greg.paffendorf@wellsfargo.com | www.paffendorfwmgroup.com

Who Am I? A Personal and Professional Snapshot

I am J. Greg Paffendorf Sr. I am a Managing Director - Investments and Senior Financial Advisor at Wells Fargo Advisors.

My training and experience working on Wall Street have given me a solid foundation. I strive to provide top-quality wealth management solutions to business owners, key workers, wealthy individuals, and families, regardless of their employment status.

I can handle complex financial strategies well. This skill helps me explain these strategies and offer you clear, simple, and understandable solutions.

I'm passionate about leveraging my skills and Wells Fargo Advisors' investment solutions to implement strategies designed to secure your financial future. I use a pragmatic approach, with counseling and education, to guide you toward your financial objectives and goals.

Our Mission and Values

At the core of my practice is the mission to educate and empower you to make informed, strategic financial decisions. My team and I value integrity, preparation, execution, and high-quality service.

We strive to give you confidence by ensuring that your financial affairs are managed with the utmost care.

Our Milestones and Successes

For decades, clients have trusted our team to successfully navigate the evolving financial needs of high-net-worth individuals, families, and institutions. Our track record speaks to our ability to create and maintain robust wealth management relationships across generations. We continually adapt our strategies to the changing, global financial landscape.

My Professional Credentials and What They Mean for You

I am a CERTIFIED FINANCIAL PLANNER®, Certified Private Wealth Advisor® (CPWA), and a Certified Exit Planning Advisor (CEPA). These designations are not just titles. They represent a deep understanding and commitment to providing best-in-class wealth management:

- *CFP®*: I have expertise in investment planning, taxes, insurance, and retirement. This ensures a holistic approach to your financial well-being.
- *CPWA®*: Because I have a specialization in high-net worth client strategies. I can focus on asset protection, growth, and tax minimization.
- *CEPA®:* I am proficient in creating robust exit strategies for business owners so I can align your business success with personal financial security.

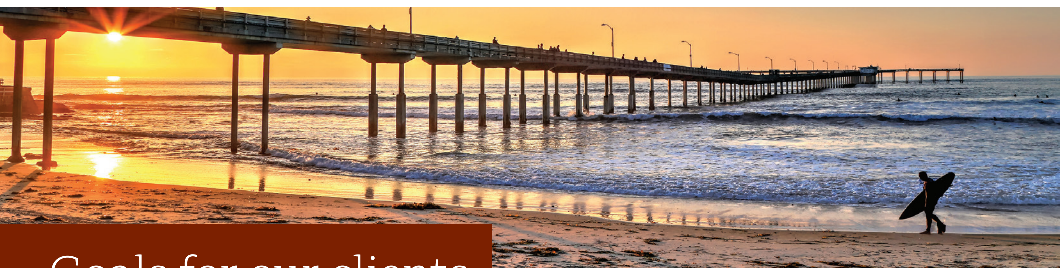
Our Wealth Management Team: Expertise at Your Service

One of the benefits of working within a Wells Fargo Bank location is access to qualified specialists in different areas, from managing investments to planning estates:

- *Investment Management*: My team and I cater to a diverse clientele, ensuring personalized investment strategies.
- *Client Services:* Our Team focuses on seamless account management and operational support.
- *Wealth Strategy:* Senior Bank Wealth Strategists and Executive Directors like Todd Schneider and Eric Smith offer tailored estate and business planning advice through Wells Fargo Bank, N.A.

greg.paffendorf@wellsfargo.com

Eugene Plahotnii
Registered Client Associate
Tel: 858.261.6268
eugene.plahotnii@wellsfargo.com



Goals for our clients

Our primary goal is for you to achieve yours. We help you achieve your long-term goals by educating you about protecting your financial future, enhancing your present wealth, and preparing for business changes. We concentrate on strategies that suit your short-, medium-, and long-term objectives.

How can you know that Paffendorf Wealth Management Group of Wells Fargo Advisors is a great fit for you?

Let's talk. We'll start with a phone conversation. I will have some questions for you. Undoubtedly, you will have some for me. You will learn how our insights and experience may help you make, keep, and leave more wealth. If you like what you've taken away and trust us to advise you further, we'll schedule a second opinion meeting. I will give you an analysis of what you are doing right. If all is well, I will congratulate you and send you your way. If we identify some "gotchas" in your strategies, you will learn how we can work together to repair those and get back on track to the future you imagine. But let's take that single step first:

Please contact me at 619.964.8281, email me at greg.paffendorf@wellsfargo.com or scan the code to visit our website. We will schedule that first call.

Why Choose Us?

We have the expertise to create wealth management plans that suit the specific needs of high-net-worth individuals and executives.

Our financial practice is centered on building lasting relationships based on education, trust and mutual respect.

It would be an honor to continue that tradition with you!