WELLS FARGO Wealth & Investment Management

Helping your clients through divorce

As your clients transition from married life to managing wealth independently, help them take advantage of strategies tailored to their specific need by working with Wells Fargo Wealth & Investment Management.

Knowledgeable guidance

Wells Fargo Wealth & Investment Management can work with you and your clients to navigate the financial complexities of divorce or loss of a spouse, support them as they emerge into a new life situation, and redefine their vision for their future. We provide knowledgeable guidance for wealth strategies and solutions designed to support their financial goals.

Helping you serve your clients

We can help you better serve your clients through their transition by:

- Preparing cash flow summaries
- Providing support for reviewing monthly financial statements, balancing accounts, and coordinating automatic payments
- Ensuring all taxes have been paid to date and assisting in quarterly estimated payments and communications to your client's CPA
- Developing a plan designed to help meet your client's needs and preserve income now and in the future
- Advising on strategic portfolio allocations and adapting them over time as your client's needs evolve
- Assisting with retitling assets and updating beneficiaries
- Preparing and putting to work a "living budget" to help maintain your client's current standard of living
- Working with estate planning counsel to manage tax, legal, accounting, estate, and asset distribution issues
- Assisting with children's financial security and interests, including directing payments and distributions for their short-term and long-term needs
- Planning for children's education and other support needs

What can we do for you?

We are committed to working together with you and your clients' other advisors, including attorneys, CPAs, and investment managers. We take the time to understand your clients' needs and goals as they transition to a new life situation and tailor a wealth plan that's right for them.

Contact a Wells Fargo financial professional to find out more about how we can help you support your clients.