

WELLS
FARGO

Wealth & Investment
Management

Philanthropic Services

Offered through Wells Fargo Bank, N.A.



What is your giving strategy?

What kind of philanthropist do you want to be? Could your giving plan be more effective? Whether you're acting globally or locally, your philanthropic specialist at Wells Fargo Bank, N.A. will help you maximize your philanthropic efforts, while aligning your giving goals with your overall wealth plan.

Your philanthropic specialist will work closely with you to:

- Define or fine-tune your charitable values
- Help shape your custom giving plan or your investment strategy
- Monitor progress and share updates
- Make adjustments on an ongoing basis in conjunction with your relationship team

Our giving continuum

Our individualized approach involves more than simply meeting your philanthropic objectives — it's a collaborative experience that helps clarify your values, your goals, how you define success, and your next steps.

To help you make the biggest impact, we'll work together through every phase of our giving continuum, from identifying your values to creating a sustainable impact for years to come.





Your partners in strategic giving

Wells Fargo Bank Philanthropic Services is dedicated to helping **organizations**, **individuals**, and **families** achieve their strategic charitable goals. We have the experience to help you bring your vision to life, from structuring lifetime giving programs to handling the day-to-day operations of a large-scale foundation.

Working with our specialists

Our philanthropic specialists are experienced professionals who have a thorough understanding of the needs, objectives, organizational characteristics, and regulatory requirements of nonprofit organizations and their donors. Located throughout the United States, our specialists have a deep affiliation with their local regions and communities. They will work closely with you and your other advisors to create a holistic, comprehensive solution.

Why Wells Fargo Bank Philanthropic Services?

In addition to offering local relationship management and far-reaching experience in the giving community, we believe that we have the resources and capabilities to offer holistic solutions to our clients that few others can replicate. We can help you navigate the administrative and regulatory tasks, leaving you time to focus on your mission.

OVER 50 YEARS
OF EXPERIENCE WORKING
IN THE GIVING COMMUNITY*

MORE THAN
\$24 BILLION
IN CHARITABLE ASSETS
UNDER MANAGEMENT*

* Source: Wells Fargo Bank Philanthropic Services, as of December 31, 2022.

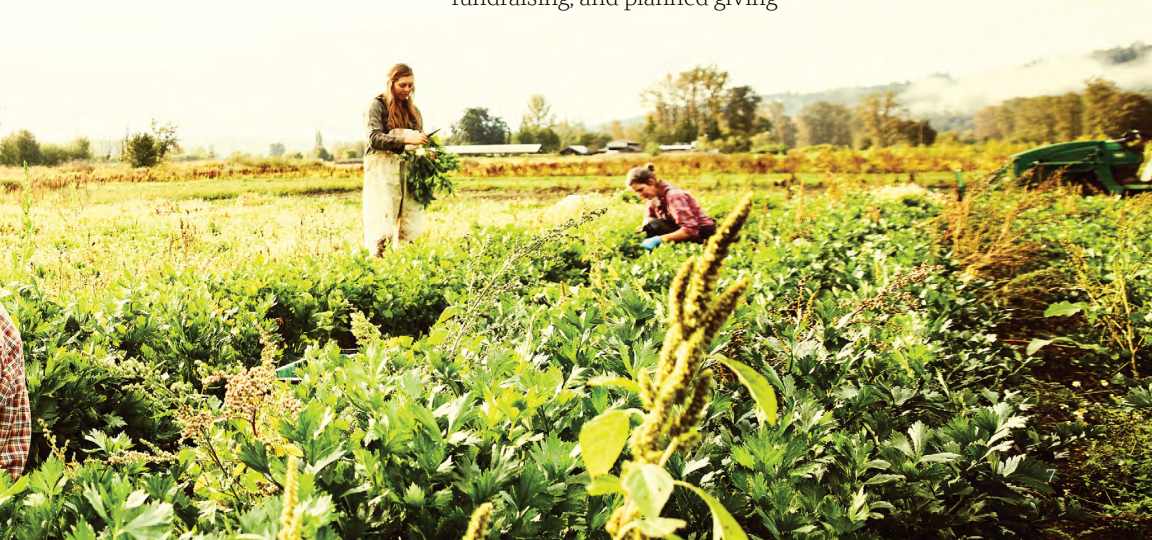


For individuals and families, our services include:

- Helping you define your values and goals to establish an appropriate charitable giving structure
- Selecting and managing investments that align with your values, including environmental, social, and governance and social impact options
- Providing specialized administration and support for a wide range of giving vehicles, including charitable remainder trusts, private foundations, and donor advised funds
- Identifying and helping you mitigate risks
- Providing grant and scholarship program management and support
- Designing web pages customized for your foundation and online grant applications

For nonprofit organizations, we offer:

- Fully diversified investment strategies
- Investment options that align with the organization's mission and values
- Customized reporting
- Specialized administrative support and development for planned giving programs
- Facilitation of required regulatory reports and filings
- Consultation to support the development and review of investment, gift acceptance, and spending policies
- Guidance for board and staff on governance, fundraising, and planned giving



Let's connect

No matter where you are in your philanthropic journey, our philanthropic specialists can help you make an impact. Contact your advisor or the Philanthropic Solutions team at 1-855-435-4108 or Philanthropic@wellsfargo.com to learn more.

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