WELLS FARGO Wealth & Investment Management

*Life*Sync

Your life. Your money.
In sync.

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

Connecting your life and your money

Can your money help you lead a more rewarding and fulfilling life? It can, if you understand what your goals are, who and what you are saving and investing for, and when you need your money to work toward your goals. The LifeSync® experience provides the path to help you do this.

The LifeSync® experience

The LifeSync experience helps you sync your finances with your values, priorities, and goals into one cohesive lifelong experience that evolves with you. The goal is to empower you to make informed financial decisions, big or small, simple or complex, that make a real and lasting impact on your life and for future generations.

The LifeSync experience pulls together the people, tools, and guidance to help you make decisions, including:

- **Your advisor from Wells Fargo** to help you understand where you are now and where you are headed, and to create a plan to guide you every step of the way
- **High-end technology and tools** to make it easy for you to plan for the future and stay connected to your information and your advisor
- **Access to Wells Fargo specialists** for focused guidance on specific strategies and solutions

Experiencing LifeSync

There are five stages in the LifeSync® experience to help you answer questions most important to you — whatever your journey.

Understand	Plan	Propose	Implement	Revisit
What do I value most?	How can my money make the most impact?	What are my options?	What is my next step?	Am I still on track?

Understand

We listen and ask questions to discover who and what is important to you. This helps you define your values, goals, and priorities.

Plan

Your advisor can create a personalized plan to connect the pieces of your financial life using robust technology to simplify complex planning. Collaboration between you and your advisor is a key part of fine-tuning the plan to clarify goals and set the stage for the future.

Propose

You will have choices to make. LifeSync helps you compare your options and make informed decisions with the help of "what if" scenarios.

Implement

It's time to put preparation into action. Your plan may include custom-tailored solutions and strategies to help you move the needle closer to achieving your goals.

Revisit

As your life changes — as it inevitably will — LifeSync helps make it easier for you to adjust a plan through actively connecting with your advisor and access to mobile technology.

Resources to support your experience

Your life is unique. Tailored to you and your specific needs, your advisor will pull together the resources, tools, and solutions to help you make the right decisions at just the right moments.

UNDERSTAND

Account Aggregator

A secure tool that can help you understand your financial picture by capturing a view of your assets and liabilities in one place.

PLAN

eMoney

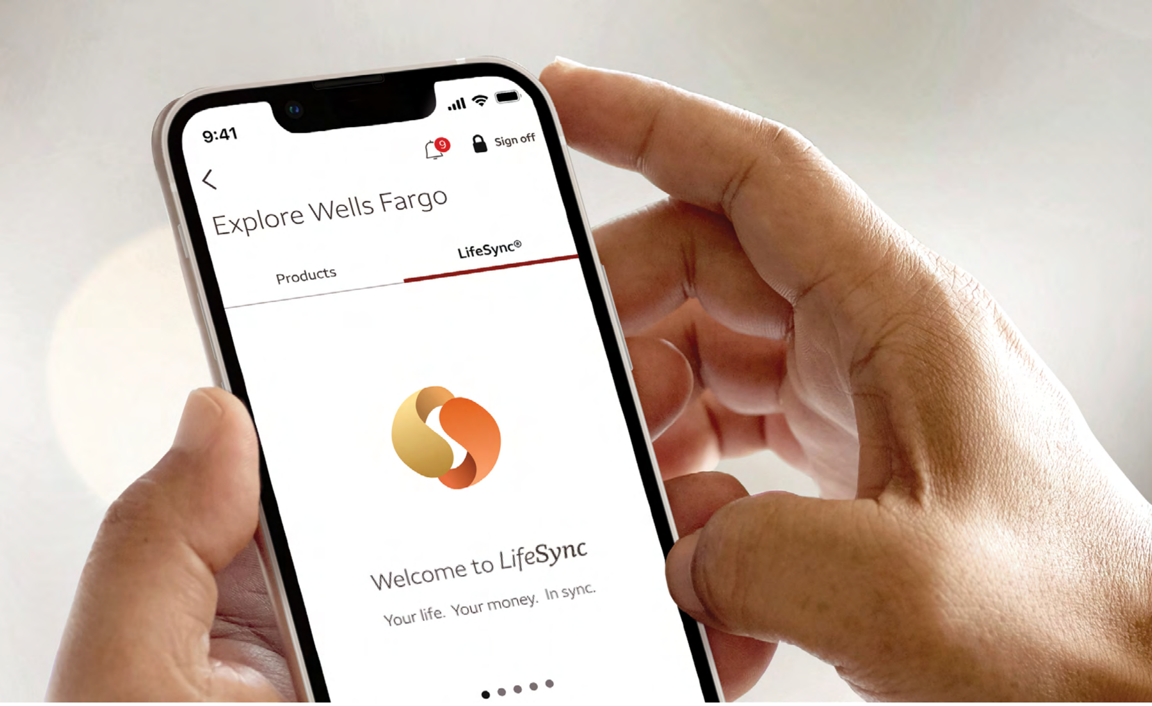
This interactive planning tool elevates collaboration between you and your advisor and helps foster a more complete path for how you can reach your goals.

PROPOSE AND IMPLEMENT SOLUTIONS

Access to dedicated specialists

When your situation calls for focused guidance on a specific topic, your advisor can bring together expertise from Wells Fargo Bank specialists from areas such as:

- Wealth and legacy planning
- Investment and asset management
- Banking services
- Trust services
- Estate services
- Philanthropic services
- Wealth and family culture services
- Business owner advisory services



REVISIT

LifeSync® in the Wells Fargo Mobile® app[1]

This feature in the mobile app helps connect you to the information you need when you need it. LifeSync in the mobile app also helps keep you connected to aspects of your plan and a real-time view of how you are tracking toward your goals.

- Identify and track your money goals
- Share new goals with your advisor and work together on how they may fit in your plan
- View a Snapshot of your vitals like — your estimated net worth, your portfolio's performance, and key data influencing your plan
- Read — and listen to — financial information and podcasts personalized to your needs

Let’s connect

Your values, your goals, and your money should work together to achieve the life you want. The LifeSync® experience can help you build a plan to set you on track now and for the future.

Contact your advisor to learn more.

1. Availability may be affected by your mobile carrier’s coverage area. Your mobile carrier’s message and data rates may apply.

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