

A photograph of three people in a modern office setting. A man in a dark suit, a woman in a light-colored sleeveless top and pants, and another man in a blue blazer and light pants are standing and talking. They are in front of a large window with a view of a city. To the right, there is a curved staircase with a white railing. The office has white chairs, a desk, and a lamp.

# The value of working with us

## Why Wells Fargo Advisors?

**We're built to seamlessly deliver sophisticated solutions for your personal, family, and business needs.**

- To provide you with access to resources and knowledge across Wells Fargo Advisors, your financial advisor is at the center of your relationship and teams with specialists offering unique insights into specific solutions designed to help meet your needs.
- To meet your goals for short-term, long-term, and legacy planning, we guide you through a multi-generational planning process and work with you to adjust plans as needed.
- To ensure your investment plan is cohesive and efficient, we coordinate with your other financial professionals.
- To support your needs in a rapidly changing world, we will stay on top of developing new skills related to ever-expanding and increasingly complex strategies for wealth and legacy planning.

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

## We're strong for our customers and communities.

Wells Fargo Advisors is part of Wells Fargo & Company, a leading financial services company that has approximately \$1.9 trillion in assets and proudly serves one in three U.S. households and more than 10% of small businesses in the U.S., and is a leading middle market banking provider in the U.S. Wells Fargo provides a diversified set of banking, investment and mortgage products and services, as well as consumer and commercial finance, through 4,900 stores and more than 12,000 ATMs and the Internet (wellsfargo.com) across North America and internationally. In the communities we serve, the company focuses its social impact on building a sustainable, inclusive future for all by supporting housing affordability, small business growth, financial health and a low-carbon economy.



**We are driven by our vision:**

*"We want to satisfy all our customers' financial needs and help them succeed financially."*

## Wells Fargo & Company Corporate Accolades

### Customer Satisfaction and Reputation

"Outstanding"  
Community  
Reinvestment Act  
Rating (2024)

*Office of the Comptroller*

Biggest Public  
Companies in  
World (2024)

*Forbes*

47<sup>th</sup> in  
America's largest  
companies (2023)

*Fortune*

100 Best  
Corporate Citizens  
of 2022

*3BL Media*

### Diversity

Top 50  
Companies for  
Diversity (2024)

*DiversityInc*

Best Places to  
Work for LGBTQ+  
Equality (2024)

*HRC Foundation*

The Best 50  
Companies for  
Latinas to work for  
in the U.S. (2022)

*LATINA Style*

Best Places to  
Work for Disability  
Inclusion (2023)

*Diversity Equality Index*

## Brand

Top 75 Most Valuable Brands in the World (2024)

*Brand Finance*

#6 Most Valuable Global Brands in the World - Banks (2024)

*Brand Z*

Most Generous Companies in America (2022)

*The Civic 50*

Top 25 Wealth Management Firms (2022)

*Bloomberg*

# Connected to our Communities

Wells Fargo & Company and our team members are fully invested in our clients and the communities we serve, as evidenced by these key corporate priorities:

## Affordable housing

- \$390 million+ donated to help address the housing affordability crisis in the country, including supporting available and affordable rentals, homeownership, and housing stability
- \$119 million to Habitat for Humanity in support of affordable and sustainable housing since 2010
- \$60 million in grants through our WORTH initiative to help create an estimated 40,000 new homeowners of color across eight markets by the end of 2025



## A more sustainable future

- \$50 million given to help address the economic, social, and environmental needs of American Indian/Alaska Native communities through organizations like Red Feather Development Group
- Working toward a low-carbon future through the Wells Fargo Innovation Incubator, which helps clean tech start-ups on their paths to market



## Building strong businesses

- \$1.5 million awarded to How Women Lead, the largest women-founded venture fund in the U.S. for women founders and women-led start-ups in the technology and health sectors
- Additional 1,000 complimentary mentorship opportunities and 13,000 hours of technical assistance to women entrepreneurs through our [Connect to More<sup>SM</sup>](#) program



## Financial health

- Approximately \$107 million invested in scholarships and programming for diverse students
- \$5.6 million in grant funding to launch “Our Money Matters” financial health initiative on Historically Black Colleges and Universities (HBCUs) and Minority Serving Institution campuses



Additional information about our achievements in social responsibility is available at:

<https://www.wellsfargo.com/about/corporate-responsibility/>

### Jason B. Thompson, CRC®

Senior Financial Advisor  
Managing Director - Investments  
13625 California St Ste 200  
Omaha, NE 68154  
Office: (402) 536-2898  
JASON.B.THOMPSON@wellsfargo.com  
<https://fa.wellsfargoadvisors.com/jason-thompson/>

Deposit products offered by Wells Fargo Bank, N.A. Member FDIC.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

©2024 Wells Fargo Clearing Services, LLC. PM-01022026-6759310.1.1