

WELLS
FARGO

Wealth & Investment
Management

Real Estate Asset Management

Offered through Wells Fargo Bank, N.A.





Realizing the value of real estate

Investing in real estate can create consistent growth and ongoing cash flow, but it also requires a significant commitment of time, knowledge, attention, and experience. Wells Fargo Bank Real Estate Asset Management can manage your real estate portfolio through a combination of investment strategies and asset management.

Our strategies are designed to enhance the full value and potential of your holdings, while addressing how they fit within your overall wealth plan. So whether you're buying, selling, managing, or transferring ownership, we're here to help.

Building your portfolio

Adding real estate to your portfolio is a major investment. Our experience in evaluating assets and weighing risk vs. reward can help you make informed choices that are right for your goals and needs. Look to our specialists to:

- Clarify your objectives
- Outline an investment strategy
- Identify, compare, and perform due diligence on potential properties
- Create a plan to reduce or help manage risks
- Coordinate the purchase closing
- Manage your assets post-closing



Managing your existing holdings

You may find the day-to-day management of your properties a strain on your time and resources. Your real estate specialist can work on your behalf to:

- Analyze cash flow and returns, and determine values to help establish an investment strategy
- Help maximize value with best-practice strategies and key transactions
- Create and review budgets and monthly reports
- Assess the performance of your holdings
- Analyze and structure leases
- Coordinate leasing activity
- Monitor and pay property taxes and request appeals, as needed
- Assess insurance coverage needs



Selling or transferring ownership

Whether you're considering a sale, an exchange, or an inheritance for future generations, selling or transferring real estate requires a carefully planned strategy.

The first step is determining your objective, which will impact the timing and method of the transfer. You may decide to sell or transfer in order to:

- Diversify your portfolio
- Create a steady income stream from your investments
- Meet your philanthropic goals
- Help reduce potential capital gains tax

Once your objective is set, our real estate professionals can:

- Identify and evaluate appropriate transfer options
- Oversee property valuation, either to set an asking price or determine your tax deduction
- Engage broker and coordinate sale activity
- Evaluate and potentially minimize the impact of capital gains tax
- Provide options on executing the sale, exchange, or transfer

Our real estate areas of experience include:

- Commercial properties
- Income-generating residential and multifamily units
- Farms, ranches, vineyards, and timber
- Vacant or undeveloped land
- More special-use and unique asset types



Let's connect

Contact your advisor to find a Real Estate
Asset Management specialist in your area.

Wells Fargo Bank Real Estate Asset Management provides asset management and does not provide real estate brokerage or real estate property management services. Specialty asset investments, including real estate, mineral interests, and closely held businesses, carry unique risks, including lack of liquidity and potential complex tax consequences, and may not be suitable for all investors.

Wells Fargo and Company and its Affiliates do not provide tax or legal advice. This communication cannot be relied upon to avoid tax penalties. Please consult your tax and legal advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your own situation at the time your tax return is filed.

Wealth & Investment Management offers financial products and services through affiliates of Wells Fargo & Company. Bank products and services are available through Wells Fargo Bank, N.A., Member FDIC.

Wells Fargo Bank, N.A. offers various advisory and fiduciary products and services, including discretionary portfolio management. Wells Fargo affiliates, including financial advisors of Wells Fargo Advisors, a separate non-bank affiliate, may be paid an ongoing or one-time referral fee in relation to clients referred to the Bank. The Bank is responsible for the day-to-day management of the account and for providing investment advice, investment management services, and wealth management services to clients. The role of the financial advisor with respect to Bank products and services is limited to referral and relationship management services. Some of The Private Bank experiences may be available to clients of Wells Fargo Advisors without a relationship with Wells Fargo Bank, N.A.

Brokerage services are offered through Wells Fargo Advisors. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, and Wells Fargo Advisors Financial Network, LLC, Members SIPC, registered broker-dealers and separate non-bank affiliates of Wells Fargo & Company.