BESPOKE BRIEFING

WELLS FARGO Advisors | Bespoke Private Wealth Group *of Wells Fargo Advisors*

"Excellence is never an accident. It is always the result of high intention, sincere effort, and intelligent execution. The pursuit of excellence isn't a destination you reach and then forget about; it's a lifelong process."

- Aristotle

“Bespoke” refers to the pinnacle of customization, where every detail is tailored to the individual’s exact specifications. It embodies the highest level of uniqueness, quality, and expert craftsmanship, delivering a result that is singularly designed and crafted with precision. A bespoke creation is not only made to fit perfectly, but also reflect timeless design, combining functionality with artistry. It’s a process driven by deep collaboration, where the end result is a one-of-a-kind solution, built to endure and serve its purpose for generations.

"The only way to do great work is to love what you do."

- Steve Jobs

We have made the decision to change the name of our practice from ***Reich Fitzpatrick Private Wealth Group of Wells Fargo Advisors*** to ***Bespoke Private Wealth Group of Wells Fargo Advisors***. We are doing so to better reflect our commitment to serving multiple generations of client families. This decision stems from a deep understanding of our clients' most important priority: caring for the people and organizations they value most, now and for generations to come. Over the years, we’ve heard from our clients how crucial it is that their wealth not only serves their needs but also provides for their children, grandchildren, and other important family members. We’re honored to be already working with many of our clients' children and grandchildren, and in some cases, their parents.

We chose the name *Bespoke Private Wealth* because it better reflects what we do, how we do it, and why we do it. It’s a name with meaning that extends beyond the founding partners and the history of the practice—it speaks to the mission we’ve always pursued for our clients. As we looked ahead to serving future generations, it became clear that our name needed to reflect not just where we’ve been, but where we are going. *Bespoke* conveys the tailored, personalized service we provide, and the word itself carries a sense of legacy— something that will resonate with generations of clients, associates, and future partners. Our practice has evolved far beyond its origins, and *Bespoke* captures the essence of what we’ve always aimed for: creating lasting value, serving with excellence, and building a legacy of trust that endures across time.

"Intelligence is the ability to adapt to change."

- Stephen Hawking

This change isn’t just cosmetic—it reinforces and extends our unwavering commitment to serving multiple generations with the same dedication, expertise, and personal care that has defined our practice from the beginning. We are not just wealth managers; we are partners in helping you and your family pursue your highest aspirations and create a meaningful legacy for those you care most about. This name change is the next step toward ensuring that legacy is built to last.

To align our practice and service model with these multigenerational priorities, we’ve realized that some significant changes are necessary. One of the most profound shifts we’ve made is in how we think about our responsibilities. Rather than focusing on individual “clients,” we now operate from a framework of “client families.” This may seem like a subtle change, but it has far-reaching impacts on the service we provide, the roles we play, and the commitments we make. The needs of a single generation will evolve, and as families grow, our responsibilities expand—often doubling or tripling as we work with multiple generations.

This expanded focus also means we must think not just in terms of years or decades but in generations. Our practice needs to grow and evolve constantly to meet the needs of the future, and the name *Bespoke Private Wealth* reflects this forward-looking approach. The previous name, rooted in the surnames of our founders, no longer encapsulates the breadth of our mission or the depth of our commitment. As we thought about our legacy and the future of the families we serve, we recognized that the practice name should better represent our values, guiding principles, and ambitions.

Much like a tailor creating a custom garment on Savile Row, *Bespoke Private Wealth* emphasizes the personal, detailed, and unique service we provide. Our process begins by understanding your specific goals, then creating a customized investment plan that fits perfectly with your family's needs. This stands in stark contrast to the "off-the-rack" solutions that many wealth management firms offer—standardized products that may be adjusted slightly but never truly personalized. Our aim is to create enduring relationships, providing deeper meaning and impact that resonates across multiple generations.

> ***"What you leave behind is not what is engraved in stone monuments, but what is woven into the lives of others."***
>
> ***- Pericles***

Our commitment to multigenerational service is not just about planning for today but striving to ensure that future generations of your family can rely on the same level of expertise, dedication, and personal care that you've come to expect from us. We believe that *Bespoke Private Wealth* better captures this mission, and we are confident that the name better reflects the living legacy we are building with you. Together, we will continue to make a lasting impact—on your family, the causes you care about, and the world around you—for generations to come.

Summary and Wrap-Up
In this edition of *Bespoke Briefings*, we are excited to announce the renaming of our practice to *Bespoke Private Wealth*. This change reflects our continuously deepening commitment to serving multiple generations of client families with the same level of dedication and expertise you have come to expect. The name *Bespoke* embodies our focus on providing customized solutions tailored to your family's unique needs, ensuring that we are aligned with your goals for today and for future generations.

We believe the growth and evolution this change signals will allow us to serve you better. Our aim is to continue delivering the highest quality service, designed to help you meet your financial objectives, while building a lasting legacy.

This transition is only possible because of you—our valued clients. Your loyalty, trust, and introductions to family and friends have allowed us to grow and evolve, and we are truly grateful for your continued support. It's an honor to be part of your financial journey, and we look forward to serving you and future generations with the same dedication we've always shown.

Thank you for trusting us with your family's wealth, and we look forward to continuing to grow together as *Bespoke Private Wealth Group of Wells Fargo Advisors*.

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