

Enjoy these exclusive benefits

As a client that qualifies for The Private Bank experience

Your advisor is committed to bringing together the best capabilities that Wells Fargo has to offer for individuals, institutional investors, and multigenerational families. As a client that qualifies for The Private Bank experience, you can look forward to a commitment to excellence backed by solutions that have been thoughtfully tailored to your specific circumstances. Additionally, you will have access to benefits that include:

Service and attention

- Around the clock dedicated support from The Private Bank Service Team
- Personal support for fraud prevention, detection, and management
- Exclusive digital experience¹
- Differentiated branch experience

Custom wealth services and specialists

- Wealth and Legacy Planning
- Family Wealth and Culture Services
- Trust Services
- Trust Philanthropic Services
- Fiduciary Investment and Asset Management
- Private Banking including Cash Management and Custom Lending Strategies
- Outsourced Chief Investment Officer (OCIO) specialized services

Access and insights

- Access to investment opportunities designed to address high-net worth needs
- Global perspective from Wells Fargo and other industry leaders
- Invitations to exclusive calls and events
- Access to our exclusive no-fee The Private Bank By Invitation Visa Signature[®] Card^{2,3}

Premium benefits

- Deposit accounts to help support your needs
- Higher limits on certain transfers and deposits
- Discounts on pricing and foreign currency

You

Advisor

Team of
Wells Fargo
Bank
specialists

1. Availability may be affected by your mobile device's coverage area. Mobile carrier message and data rates may apply.
2. Please review your applicable Wells Fargo Bank account agreement and card terms and conditions for information on liability for unauthorized transactions.
3. Credit cards are offered through Wells Fargo Bank, N.A., and are subject to credit approval, verification, and collateral evaluation. Products are not available in all states. Programs, rates, terms, and conditions are subject to change without notice. Certain restrictions, limitations, and exclusions apply. Please review the Wells Fargo Private Bank By Invitation Visa Signature® Guide to Benefits for details.

Disclosures

Wells Fargo Private Bank (The Private Bank) experience connects clients with products and services provided by Wells Fargo Bank, N.A. and/or Wells Fargo Advisors. Wells Fargo Bank, N.A. provides investment management services as part of its trust and fiduciary services, deposit products, lending products and other bank products. Wells Fargo Advisors provides investment advisory and brokerage services. 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. Wells Fargo affiliates, including Financial Advisors of Wells Fargo Advisors, may be paid an ongoing or one-time referral fee in relation to clients referred to the Bank. For Bank products and services, 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. Eligibility for The Private Bank experience is subject to change without prior notice. Products and services may have qualification or pre-acceptance requirements that are different than the eligibility requirements for The Private Bank experience.

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

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.