

Service Team Outline

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 Geoffrey Lemoine, Senior Registered Client Associate, T: 858-523-7943, E: geoffrey.lemoine@wellsfargoadvisors.com
 Ani Thambi, Wealth Client Performance Analytics Consultant, T: 858-523-7940, E: ani.thambi@wellsfargoadvisors.com

Contacting For	Service Team Member
Investment Advice	Scott Sutherland
Market Overview/News	Scott Sutherland
Security Analysis	Scott Sutherland
Investment Objectives	Scott Sutherland
Risk Tolerance	Scott Sutherland
Financial Goals	Scott Sutherland
Changes to Investment Time Horizon	Scott Sutherland
Trading (Equity, Option, Mutual Fund, Other)	Scott Sutherland
Account Review	Scott Sutherland
eMoney® Interactive Planning	Scott Sutherland
General Account Maintenance	Geoffrey Lemoine, Ani Thambi
Contact Information Updates	Geoffrey Lemoine, Ani Thambi
New Account Opening	Geoffrey Lemoine
Trading/Order Entry Support	Geoffrey Lemoine
Document/Form Requests	Geoffrey Lemoine, Ani Thambi
Fee Details	Geoffrey Lemoine, Ani Thambi
Online Access Set Up	Geoffrey Lemoine
Check & Debit Card Orders	Geoffrey Lemoine
Debit & Credit Card Service Issues	Geoffrey Lemoine
Statement Preferences/Statement Linking	Geoffrey Lemoine
Asset Movement Requests: Wires ACH's Journals Check Disbursements ACAT Transfers Free Deliveries	Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine Geoffrey Lemoine
IRA Requests: Contributions Distributions Rollovers Roth IRA Conversions Consolidations Custodian Transfers	Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine Geoffrey Lemoine Geoffrey Lemoine Geoffrey Lemoine
Report Requests: Account Reports, Portfolio Reports Account and Household Performance Statements Confirmations Agreements Tax Documents	Geoffrey Lemoine Geoffrey Lemoine Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi
Account Information Inquiries: Activity Balances Cash Management	Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi Geoffrey Lemoine, Ani Thambi