



## Philanthropic Services

*Offered through Wells Fargo Bank, N.A.*

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*As a nonprofit organization or philanthropic individual, you serve your community and the causes that are important to you with care and compassion, and seek to make a positive difference in the lives of others. At Wells Fargo Bank, we are dedicated to helping nonprofit organizations, individuals, and families achieve their strategic charitable goals and missions. By working together to understand your unique needs, we can provide strategies specifically designed to help meet your objectives and help bring your charitable vision to life.*

### Why Wells Fargo Bank Philanthropic Services?

Managing more than \$25 billion<sup>1</sup> in charitable assets across the nation, Wells Fargo Bank's Philanthropic Services provides a comprehensive array of specialized services and charitable solutions, supported by the resources of one of the most respected and admired financial institutions in the United States.

Located throughout the United States, our philanthropic specialists are highly skilled leaders in their fields and have a thorough understanding of the needs, objectives, organizational characteristics, and regulatory requirements of nonprofit organizations and their donors. Additionally, we recognize the importance of charitable gifting as part of your individual wealth management strategy and estate plan. Our consultative approach can help you overcome the challenges of putting an appropriate philanthropic plan in place and create the charitable legacy you desire.

## Services for nonprofit organizations

Our team can help deliver strategies and customized investment management for your organization's unique needs and values. We have thorough experience assisting different types of nonprofit organizations, including:

- Schools, colleges, and universities
- Cultural organizations
- Churches and religious organizations
- Corporate foundations
- Hospitals and medical centers
- Community foundations
- Social welfare organizations

For nonprofit organizations, we specialize in the following services:

- Fully diversified investment strategies<sup>2</sup>
- Investment options that align with your organization's mission and values
- Customized reporting
- Specialized administrative support and development for planned giving programs
- Facilitation of required regulatory reports and filings
- Consultation to support the development and review of investment, gift acceptance, and spending policies
- Guidance for board and staff on governance, fundraising, and planned giving

We can integrate investment management, fiduciary administration services, governance advice, compliance, and tax reporting into a comprehensive offering delivered locally. We use a team-based approach so your philanthropic specialist is supported by a team of professionals dedicated to helping you meet your needs. They will coordinate your other Wells Fargo Bank trust, investment, and banking professionals—as well as with your personal attorney, accountant, and other advisors—to offer holistic wealth management services to help with all of your financial needs.

## Services for individuals and families

For philanthropic individuals and families, we offer consulting, administrative, and investment services for structured lifetime giving programs:

- Charitable trusts
- Family foundations
- Donor advised funds

Our experienced professionals can assist in designing a plan that helps maximize the efficiency of your charitable gifts and aligns with your overall wealth management strategy. We begin with a review and assessment of your present and future resources, financial and family goals, and charitable values. Then, we work with you to develop appropriate strategies for your unique situation and implement and administer your plan, managing designated assets in accordance with your plan's objectives. Over time, we provide regular account monitoring and continuous planning support.

## Let's connect

To learn more about how Wells Fargo Bank Philanthropic Services can help serve the needs of your nonprofit organization or meet your individual charitable goals, please contact your advisor or philanthropic specialist.

<sup>1</sup>Wells Fargo Bank Philanthropic Services as of December 31, 2023.

<sup>2</sup> Asset allocation cannot eliminate the risk of fluctuating prices and uncertain returns nor can diversification guarantee a profit in declining markets.

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.

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Trust Services are available through Wells Fargo Bank, N.A. Member FDIC and Wells Fargo Delaware Trust Company, N.A.

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