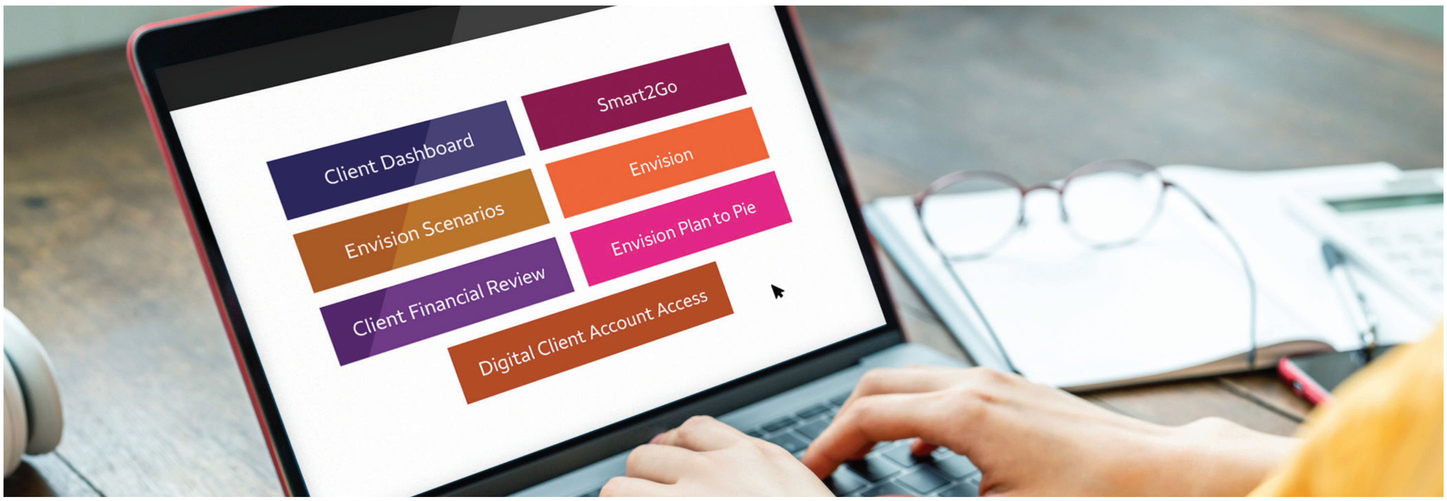
WELLS FARGO Advisors

Integrated technology solutions to help financial advisors meet evolving client needs

Overview of advisor technology at Wells Fargo Advisors



Technology should help provide a means to deepening relationships and managing your practice as efficiently as possible. Wells Fargo Advisors' fully integrated, single sign-on platform is designed with the advisor/client relationship in mind. Its human-centered design supports the way financial advisors work and the way clients live.

It's all available at your fingertips, on-the-go, to give you an edge when preparing for client meetings and staying connected to your team.

Benefits of Wells Fargo Advisors' comprehensive technology solutions

- Saves time
- Increases productivity
- Helps you deliver exceptional service
- Nurtures client relationships
- Keeps you informed

What our technology can offer you:

Relationship management

- Access your client's account summary, notes, assets, goals, and opportunities in one central location.
- Set up proactive touch-points with your clients and document communications with ease.

Practice management

- Find news and opportunities that directly affect your clients.
- Create reports for clients across your book of business.
- Turn your speech into text, making it easier and faster to document client conversations, advice, and guidance.

Research and education

- Access the firm's internal research and information.

Advice and planning

- Enhance your client interactions with a client-approved, easy-to-understand summary of your client's financial picture.
- Discuss your client's life goals and develop a plan to support them.
- Access portfolio analytics and alignment tools.

Service

- Help clients gain an understanding of how and where their income may come from in their retirement years.
- Evaluate different claiming strategies for Social Security benefits.

Mobility

- Deliver quality advice in preparation for, during, and following a client or prospect meeting while away from the office.

To discuss the possibilities of building your successful financial practice at Wells Fargo Advisors, please contact me today.

Branch Manager Photo

BM1 First Last Name, Approved Designations 1,2,3
BM1 Approved Title 1
BM1 Approved Title 2

BM1 Direct/Office/Toll Free Phone 1
BM1 Email Address
BM1 Approved Website URL

joinwfadvisors.com