



Advisors

An innovative succession plan

Our Summit Program is designed to ensure a smooth transition of clients between the retiring advisor and the receiving advisor – and you'll benefit from our compensation structure, too.

Investment and Insurance Products:

NOT FDIC Insured	NO Bank Guarantee	MAY Lose Value
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Ability to use
customized
valuations up to

200%
of T12

OR

225%
of T12 with
Summit Program

Take control of the future of your business

If you're thinking about retirement, look no further than Wells Fargo Advisors' Summit Program. We believe our succession planning program is a true game-changer in the industry. Here's how it can help take care of you:

- ✓ Stability and continuity for your clients through branch and market support
- ✓ Customized payment options for retiring advisors, including value for their book of business
- ✓ A dedicated team of experts to support, guide, and serve you at every turn



Give me a call today to discuss how we can make the most of your future.

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