Wealth and Investment Management (WIM)

Wealth and Investment Management (WIM) is one of the company's four main divisions. With $1.9 trillion in client assets, WIM businesses build enduring client relationships through sound, thoughtful and objective advice. We help our clients by developing individualized plans for everything from retirement goals to business succession planning, to family legacy intentions. Services include comprehensive planning and advice, investment management, brokerage, private banking, estate planning strategies, trust, insurance and both individual and institutional retirement.

WIM's mission is to help our clients achieve financial peace of mind. We do so through six WIM lines of business — Abbot Downing, Institutional Retirement and Trust (IRT), Wealth Management, Wells Fargo Advisors (WFA), Wells Fargo Asset Management (WFAM), and Wells Fargo Investment Institute (WFII).

Wealth and Investment Management Lines of Business:

Wealth Management (WM): Wealth Management business is a leading provider of financial services to high-net worth clients through Wells Fargo Private Bank, and to the affluent segment through partnerships between Wealth Brokerage Services and the Community Bank. In Wealth Management, clients are provided with a complete range of solutions to help them manage, preserve and transfer their wealth.

Wells Fargo Advisors (WFA): Wells Fargo Advisors operates the nation's third-largest Brokerage business with 14,400 Financial Advisors and 4,500 licensed bankers in retail stores across the U.S. Wells Fargo Advisors administer $1.6 trillion in client assets. Unprecedented choice and flexibility for Financial Advisors and their clients is provided through distinct business channels supported by established products, services and technology.

Retirement: Wells Fargo Retirement is a top retirement provider to retail and institutional customers across the U.S. and is ranked as the seventh-largest retirement plan record keeper by *PLANSPONSOR* Magazine. The company also administers custody assets, provides investments and executive benefits to institutional clients and delivers reinsurance services to global insurance companies.

Abbot Downing (AD): Abbot Downing is a boutique business within Wells Fargo that serves individuals and families with investable assets of at least $50 million or net worth of $100 million, as well as their endowments and foundations. Abbot Downing strives to build long-standing relationships by helping clients preserve and grow wealth, address the impact of wealth across generations and leave a legacy of purpose.

Wells Fargo Asset Management (WFAM): Wells Fargo Asset Management brings together a strategic balance of investment capabilities to serve the investment needs of clients worldwide: institutions, financial advisors, and individuals. Wells Capital Management is a registered investment advisor and a dedicated institutional asset manager within the WFAM umbrella. Their mission is to deliver superior investment service to our institutional clients globally.

Wells Fargo Investment Institute (WFII): Wells Fargo Investment Institute (WFII) is a registered investment adviser and wholly-owned subsidiary of Wells Fargo & Company, providing investment research guidance, strategy, manager research, portfolio solutions and thought leadership within the Wealth and Investment Management (WIM) division, with the goal of supplying world class advice to the company's financial and wealth advisers. WFII provides investment advice to Wells Fargo Bank, N.A., Wells Fargo Advisors and other Wells Fargo affiliates.

*Relevant military experience is considered for veterans and transitioning service men and women.
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