

### Our vision:

“We want to satisfy our customers’ financial needs and help them succeed financially.”

*Vision & Values, Page 4*

## What a business banking advisory specialist does

Regional business banking advisory specialists provide a single point of contact for branch team members, acting as liaisons between Wells Fargo retail banking and business banking. They work with new and existing customers to assess needs in order to fully understand the customers’ business objectives, strategies, challenges, and financial priorities. Regional business banking advisory specialists develop strong relationships with internal teams, bankers, and other lines of business to deliver an exceptional customer experience. They also review key indicators to identify individual and team developmental needs, including analyzing market information to present options regarding products and services for customers in various geographic locations. Additionally, they distribute new or re-designed training material or programs to meet business needs.

## How a business banking advisory specialist helps customers succeed financially

Put customers at the center of everything you do:

- Display a friendly, positive attitude while serving both internal and external customers and possess strong customer service skills
- Engage customers in meaningful financial conversations that include understanding what’s important to them
- Once customer consent is obtained, refer the customer to the appropriate relationship manager in a time-sensitive manner

Earn the customer’s trust:

- Put the customer first and do what’s right for the customer
- Follow through on commitments
- Protect customer confidential data and information

Possess strong character and values:

- Follow Wells Fargo’s Code of Ethics and Sales Integrity policy
- Exhibit a high degree of integrity, trustworthiness, and professionalism at all times
- Manage risk by maintaining appropriate controls to ensure operational integrity and compliance with applicable laws, regulations, policy requirements, and audit procedures

Embrace the opportunity to learn and teach others:

- Learn about products and services that can help better align the appropriate channel/resource
- Seek opportunities for self-guided learning and embrace coaching and feedback from fellow team members

Work effectively with a diverse team:

- Lead by example to create an inclusive and professional environment where all team members are respected and diversity is valued
- Demonstrate genuine care for every team member, taking the initiative to assist others
- Participate in meetings and share ideas to help achieve team objectives

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## What you can expect from us

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Our next big investment is in YOU. At Wells Fargo, we value and support our people as a competitive advantage. We work to attract, develop, engage and retain team members who reflect the diversity of the customers and communities we serve. We say team members, not employees, because our people are a treasured resource to be invested in, not expenses to be managed – and because teamwork is essential to our success in helping customers.

At Wells Fargo, each person is valued for individual skills and talents, has the opportunity to fulfill personal ambitions, and contributes to the success of the company. That's why, in addition to ongoing coaching and career development, Wells Fargo provides all eligible team members with a comprehensive set of benefits designed to protect their physical and financial health and to help them make the most of their financial future.



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## About us

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Wells Fargo & Company (NYSE: WFC) is a diversified, community-based financial services company with \$1.9 trillion in assets. Founded in 1852, Wells Fargo provides banking, insurance, investments, mortgage, and consumer and commercial financial services through more than 8,600 locations, 13,000 ATMs, online ([wellsfargo.com](https://www.wellsfargo.com)), and mobile devices.

At Wells Fargo, we embrace our responsibility to be a leading corporate citizen – socially, economically, and environmentally – and the opportunity to create more resilient, sustainable communities through our operations and actions.

Wells Fargo's brand is supported by principles to deliver on our purpose and promise to work together to differentiate us from our competitors:

- Relationships that last a lifetime. We know our customers and care about them as individuals. In every interaction with us, they feel understood, recognized, and supported through their financial journey.
- Going the extra mile to do what's right. We put the interests of customers and communities first in all we do. We come through for them so they know we are there in good times and bad. We work to make their lives easier.