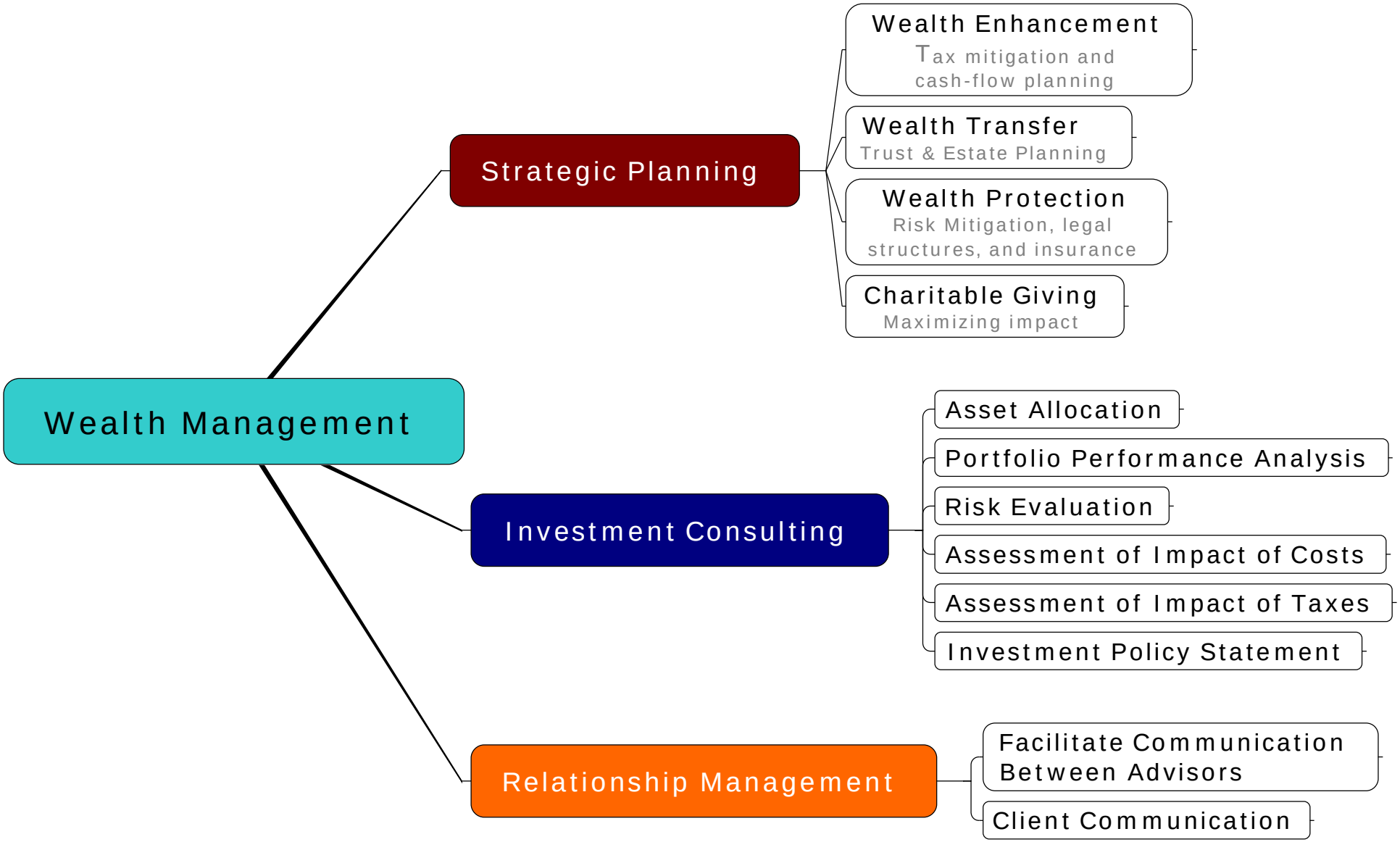Wealth Management Overview