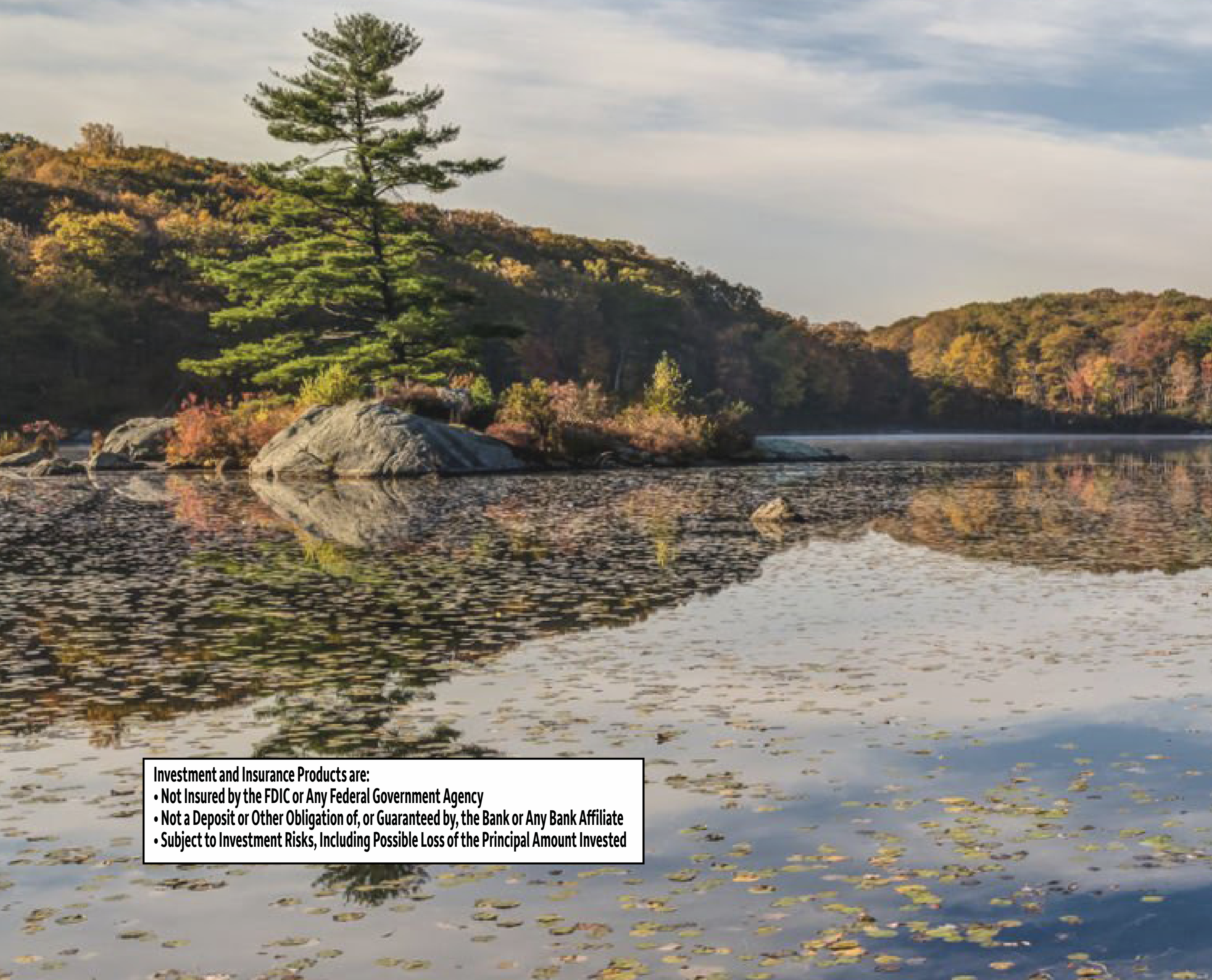
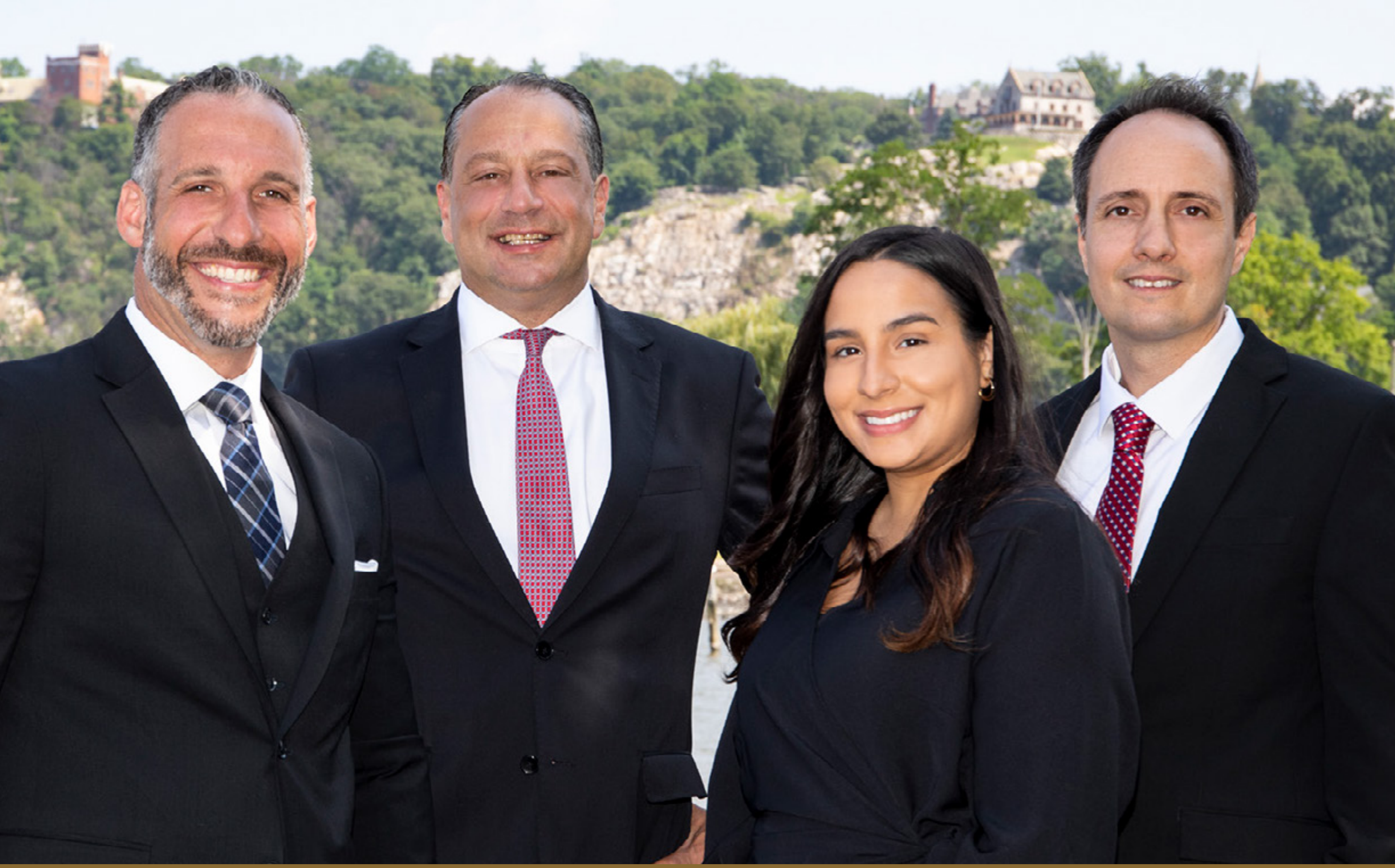
Advisors

Gatto Fidelio Grande Investment Group
of Wells Fargo Advisors

Your personal wealth and investment management guides





WHAT WE BELIEVE

Making a positive impact

At Gatto Fidelio Grande Investment Group of Wells Fargo Advisors, our mission is to have a positive impact on the lives of our clients by helping them achieve their goals and feel confident about their finances. We do this by providing holistic investment planning and advisory services tailored to the specific needs of each client's goals and values.

WHAT WE DO

Your guide to goals-based wealth management

As financial advisors, we are committed to providing you with informed perspectives and tailored approaches to your needs and challenges. But as your trusted guides, we lead with a deep understanding of your financial priorities and then apply appropriate financial solutions to help optimize your wealth.

Backed by a heritage of client service

As one of the nation's premier wealth management firms, Wells Fargo Advisors is known and respected for the responsible stewardship of its clients' assets. With roots dating back to 1879, it grew through mergers with some of the most respected regional and national financial companies. A non-bank affiliate of Wells Fargo & Company, Wells Fargo Advisors prides itself on exceptional service based on trust and knowledge, having built a corporate culture that puts client needs above all else.

What's in it for you:

- A firm driven by helping clients succeed financially
- Investment planning centered around your goals
- Robust resources to help achieve your goals
- A dedicated team of financial advisors to help personalize those resources to you

Where we excel with Wells Fargo Advisors

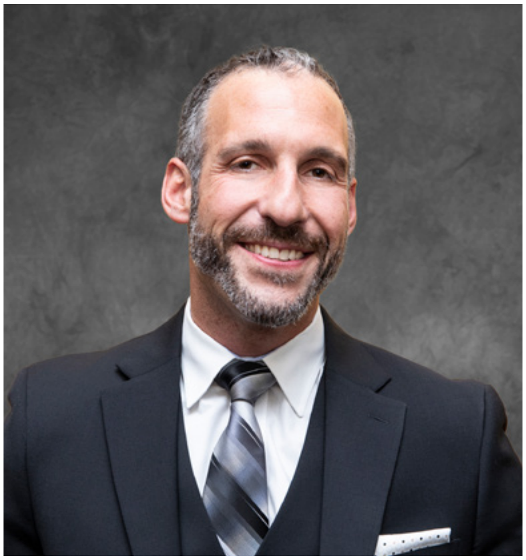
Unprecedented choice and flexibility for financial advisors and their clients through distinct business channels supported by established products, services, and technology

Dedicated to financial advisors and their relationships with clients

Unique structure and scale that combine the capabilities and best practices available through a large, national firm with a client focus more typical of smaller firms

Your team, ready to guide your way

We are experienced, knowledgeable, Financial Professionals. We are family members. We are diligent, hard workers who empower our clients to manage their finances.



Mark Fidelio

Senior Vice President – Investment Officer
Senior Financial Advisor
Fundamental Choice Portfolio Manager

"As a child of Italian immigrants, I learned hard work and strong family values at a young age. In working with my clients, I keep these ideas top of mind, and I love seeing them reach their goals and having a meaningful impact on their lives."

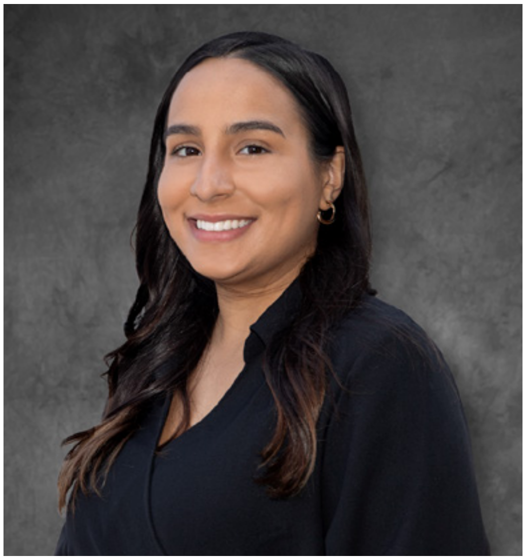
Thomas Gatto

Managing Director – Investments
Senior Financial Advisor
Fundamental Choice Portfolio Manager

"I'm passionate about taking care of my family, so I appreciate having a career where I can help clients take care of their own families. I educate them about their financial options and help them turn long-term financial dreams and life goals into a reality through sound investment planning."

If you'd like to learn more about our professional backgrounds and personal lives, scan the QR code to visit our website.

FA.WFA.com/Gatto-Fidelio-Grande



Giovanni Grande

Financial Advisor

"My parents came to America with very little and worked hard to ensure their three children went to college—I want to help my clients offer their children with dream opportunities as well, and I do so with the same diligent work ethic that my parents modeled for me."

Anny Santiago

Client Associate

"My family instilled a belief in me that there is beauty and fulfillment in helping others, however you can. I get to help clients simplify their day-to-day financial lives and work toward their personal goals, and I am passionate about this opportunity."

Our solutions

Our suite of solutions is customized to each client's investment and wealth management goals. Your current circumstance and goals for your future help us determine what products and services are best suited for your personalized plan.

Planning for Retirement

Helping individuals and families plan for retirement is our bread and butter. The LifeSync® process is central to how we help you make decisions about income, lifestyle, legacy, and more.

Insurance

If you were sick, injured, or died, would your family have the resources to achieve their goals? Unpredictable things happen, and we can help you make sure your family is financially ready for those situations.

Individual Retirement Account (IRA)

You can benefit from tax-advantaged investing in an IRA. Even if you already participate in a qualified employer-sponsored retirement plan, an IRA can help supplement these savings.

Estate Planning Services

An estate plan is necessary for most investors who carry varying types of assets. We will work with your estate planning attorney and accountant to establish arrangements for your assets when you die.

Advisory Services

A lot may be riding on your investments: retirement, children's or grandchildren's education, or your financial legacy. Give your investment plan the attention it deserves with strategies that match your long-term goals.

401(k) Distribution Options

If you are changing jobs or retiring, one of the most important decisions you may face is how to handle your accumulated savings. Choosing an appropriate strategy can help minimize taxes and make the most of your savings.

Investment Products

Your investments should work together to help you accomplish your financial goals. That's why we're here. We help you determine the types of stocks, bonds, mutual funds, exchange-traded funds, and other products that will serve your priorities.

Business Services

Your company is one of your most important assets and the product of your hard work. We are committed to helping you maximize the success and profitability of your business with resources specific to business owners.

See final page for important disclosures.

OUR PLANNING PROCESS

The LifeSync® experience

The LifeSync experience helps you sync your finances with your values, priorities, and goals into one cohesive and lifelong experience that evolves with you. The goal is to empower you to make informed financial decisions, big and small, simple or complex, that make a real and lasting impact on your life and for future generations.

The LifeSync experience pulls together the people, tools, and guidance to help you make decisions, including:

Your financial advisor from our team to help you understand where you are now, create your plan, and guide you through every step of your journey

High-end technology and tools to make it easy for you to plan for the future and stay connected to your information and your advisor

Access to Wells Fargo specialists for focused guidance on specific strategies and solutions that support your plan and goals

Experiencing LifeSync

There are five stages in the LifeSync experience to help you answer questions that are most important to you – wherever your journey takes you.

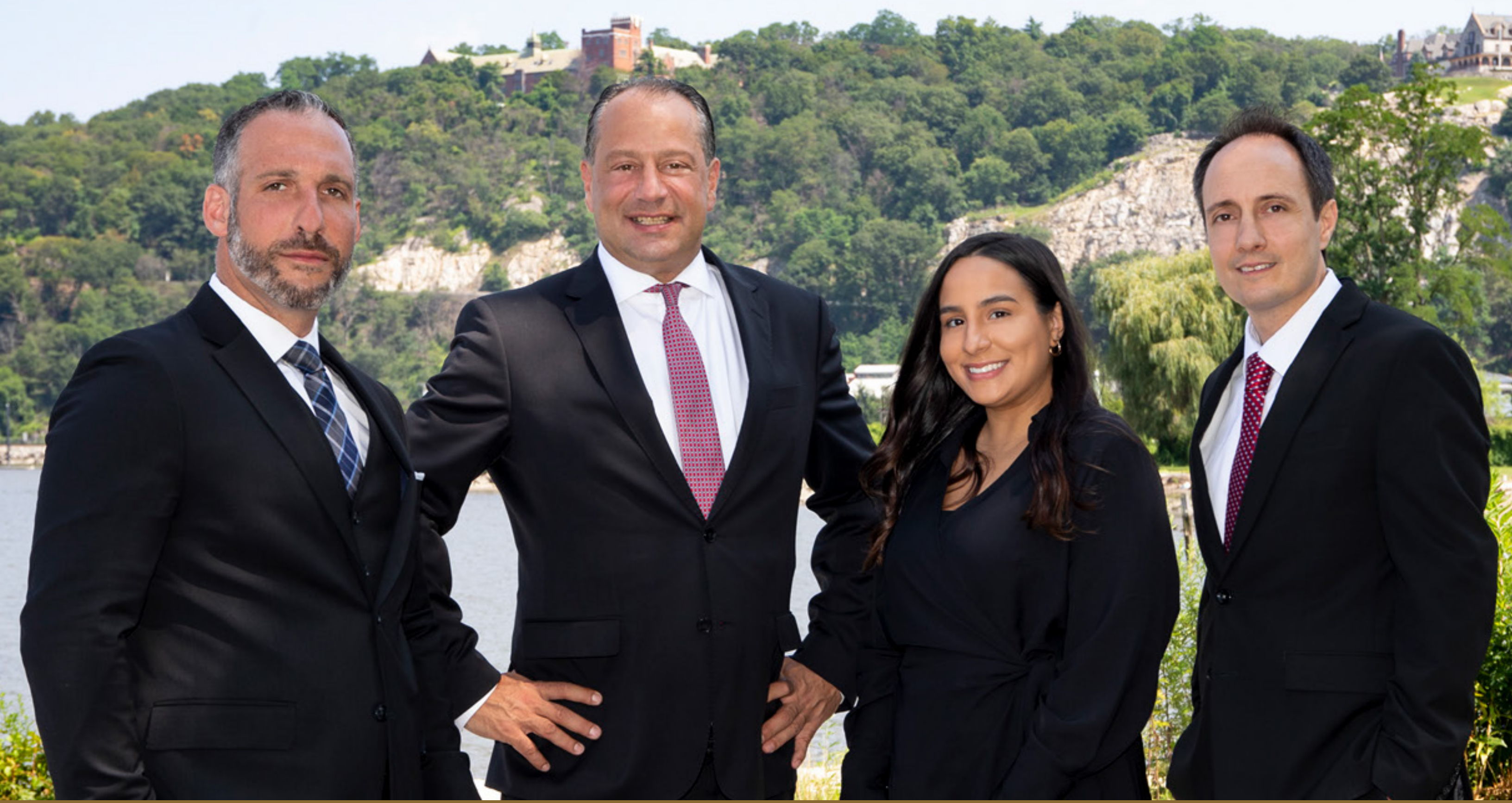
Understand
What do I value most?

Plan
How can my money make the most impact?

Propose
What are my options?

Implement
What is my next step?

Revisit
Am I still on track?



We'd love to hear from you

Now that you know a bit about us, we hope to hear from you. Call or email us to set up a conversation with a team member or visit our website for more in-depth information.

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