ASTRA

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Family Wealth Services

Investment Management

- Risk-managed strategies

- Rebalancing strategies

- Retirement income strategies

Retirement Planning

- Retirement plan investments and distributions

Wealth Preservation Strategies

- Types of ownership; beneficiary designations

- Wealth preservation strategies

- Family wealth planning with the next generation

- Tax-efficient investment strategies

Insurance Planning and Asset Protection[1]

Retirement Planning

- Retirement plan investments and distributions
- Retirement income strategies
- Stock option grants or restricted stock
- Social Security claiming strategies

Business Services

- Employer sponsored retirement plans
- Business valuation
- Non-qualified retirement plans
- Cash balance plans

Institutional Consulting & Endowments

- Foundations/Endowments
- Non-Profits & Charitable Techniques
- Investment Policy Statement Review

Life Transitions Strategies

- Death of a loved one
- Job change
- Coping with Illness
- Marriage
- Birth of a child
- Sudden income and inheritance
- Divorce

Insurance Planning and Asset Protection[1]

- Adequate insurance protection
- Management plan for incapacity/disability
- Healthcare expense planning
- Long-term care strategies

Liability Management[2]

Through Wells Fargo Advisors affiliates, you have access to banking services, including:

- Residential mortgage
- Home equity financing
- Securities-based lines of credit
- Business lending
- Access to trust services

Charitable and Community Giving

- Discuss various charitable techniques
- Explore strategies to instill philanthropic values in the next generation

Coordination & Planning Consultations[3]

- With your chosen Attorney
- With your chosen Tax Advisor
- With your family and loved ones
- Corporate Trustee Services

IMPORTANT DISCLOSURES

1 Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.