Wells Fargo Wealth & Investment Management

June 2026

“Legacy” Video Transcript

Investment and Insurance Products:

NOT FDIC Insured	No Bank Guarantee	May Lose Value

The future of your wealth starts today. Your wishes, your decisions, and especially the conversations you have. For many families, planning for the future can feel easy to postpone. Yet without a clear estate and legacy plan, the story of what you’ve built may be left open to interpretation.

[Onscreen graphic: **56% of U.S. adults have no estate plan**; **Only 31% have a living will**; **Source: Trust & Will’s 2025 Estate Planning Report**]

Your wealth has the potential to do more when it’s managed with intention. Thoughtful planning can help provide greater flexibility and shield your life’s work from estate and transfer taxes — helping to ensure more of what you built benefits the people and causes you love.

[Onscreen graphic: **Today’s estate tax exemptions may offer meaningful planning opportunities**]

A meaningful first step is taking a moment to consider a few important questions. What should your wealth accomplish? Are your assets built to endure? And, are your intentions clearly stated?

Your choices today can have an impact that can last generations. When you speak openly about what matters most — you’re not just managing wealth. You’re passing down meaning.

[Onscreen graphic: **The most meaningful plans start with conversations**]