



April 2026

## “Recruiting Momentum: Why Advisors Are Choosing Wells Fargo”

[music]

### [Media coverage of Wells Fargo recruiting successes]

>> Narrator: In 2025, Wells Fargo Advisors delivered its strongest advisor recruiting results in more than a decade. That strength in recruiting is a critical driver of growth, helping us attract new to the firm clients and their assets. And it wasn't driven by market timing or short term incentives. It was the result of a rebuilt advisor platform, disciplined execution, and a renewed confidence in where the business is going.

### [Barry Sommers interview: The Wall Street Journal Invest Live 2026]

>> Barry Sommers: The most important thing we could do is attract the best advisors to our platform. And the reality is, you know, over the past 15 years, not only are clients changing, but advisors are changing. They have more options today than they did before. And our perspective is, regardless of what stage of their career they're in, they want really good technology and access to a balance sheet. I can't tell you how important, especially the ultra high net worth space, it is to have a balance sheet and to be able to be there for clients. It's enabled us to attract the best advisors in the business. If you look at the last couple of years, that's been the big change at Wells Fargo.

### [WIM leaders on stage, Advisors at event]

>> Sol Gindi: We're really starting to see the types of results that we think our franchise is capable of.

>> Barry Simmons: Now is one of the best times to be at this firm. And I would like to say, we're just getting started.

>> Farhad Firoozi: We're the number one destination for moving to a W2 channel. We're going to set more records this year for recruiting within markets, and that is because those teams are fully aligned. They are firing on all cylinders.

>> Dave Altshuler: There's definitely an abundance of top teams joining Wells Fargo at a rate that we've never seen before. First and foremost is the flexibility and choice that they have on how they're going to affiliate. That's what's most attractive taking advantage of the platform, having choice and being able to unlock enterprise value when the time is right.

>> Dani Wright: They come for the resources. They stay for the culture.

>> Matt Arnold: When you affiliate with wealth and investment management across any of our channels, you have access to local subject matter experts that can solve your client needs, whether it's planning, trust, banking or lending. If your client has a need, you'll have a solution to bring to the table.

>> Krista Goryl: So we've actually been bringing over more Private Wealth advisors than we ever have before. And they're coming for the capabilities that we have here for our ultra-high net worth clients. So when they come over, they're really excited to see that not only do we have everything that they need to manage the client's wealth, being their primary advisor, but they can pull in resources across Wells Fargo to help with whatever that client might need. We have no blind spots. We can address anything in a client's financial journey and bring it to them locally in one institution.

>> Narrator: WIM has fundamentally modernized its technology foundation, consolidating fragmented legacy tools into a single integrated advisor platform backed by industry leading tools.

### **[Barry Sommers interview: The Wall Street Journal Invest Live 2026]**

>> Barry Sommers: One of the most exciting things we've invested in is our technology platform, you know, a billion dollars, and just revamping it. And that's completely changed the client experience right in front of them. They want to have timely, fast ideas. They want information. Our ability to deliver that is really important.

### **[Advisor Gateway application screens]**

>> Narrator: From portfolio management to planning. Our tools are designed to help advisors spend more time with clients, and less time navigating systems.

>> Erik Karanik: At the heart of our platform is Advisor Gateway. It's built on state of the art technology and feedback from advisors and their peers. It's the powerhouse behind an advisor's practice, which really gives them the ability to do what they do best.

>> Eve Varner: Through all of these tools and applications under one roof in Advisor Gateway for FAs and CAs, to not just deepen client relationships, drive growth in their practices, and above all, drive growth and efficiency through everything they do.

>> Sol Gindi: It takes so many of the pieces that we built in the last couple of years, and puts them together into a really easy and simple way to propose our solutions to our clients.

>> Krista Goryl: So we're always enhancing our platform, whether it's investments or credit or technology, and making sure our advisors know those enhancements so they can bring them to their clients.

>> Sol Gindi: It is an incredible achievement for our business and a tremendous opportunity going forward.

### **[Wells Fargo Wealth & Investment Management logo]**

**[Text: Built for Advisors. Built for Growth.]**

[music ends]

Disclosures:

Commercial Banking products and services are provided by Wells Fargo Bank, N.A. and its subsidiaries and affiliates. Wells Fargo Bank, N.A., a bank affiliate of Wells Fargo & Company, is not liable or responsible for obligations of its affiliates. Deposits held in non-U.S. branches are not FDIC insured. Products and services require credit approval.

Wells Fargo Corporate & Investment Banking (CIB) and Wells Fargo Securities (WFS) are the trade names used for the corporate banking, capital markets, and investment banking services of Wells Fargo & Company and its subsidiaries, including but not limited to Wells Fargo Securities, LLC, member of NYSE, FINRA, NFA, and SIPC, Wells Fargo Prime Services, LLC, member of FINRA, NFA and SIPC, and Wells Fargo

Bank, N.A., member NFA and swap dealer registered with the CFTC and security-based swap dealer registered with the SEC, member FDIC. Wells Fargo Securities, LLC and Wells Fargo Prime Services, LLC, are distinct entities from affiliated banks and thrifts.

Wells Fargo Trust is a part of WIM and offers services through Wells Fargo Bank, N.A. and Wells Fargo Delaware Trust Company, N.A.

Deposit products provided by Wells Fargo Bank, N.A., Member FDIC. Deposit insurance only protects against the failure of an insured depository institution and is subject to FDIC rules, including pass-through coverage which requires certain conditions to be satisfied.

Wells Fargo Investment Institute, Inc. is a registered investment adviser and wholly-owned subsidiary of Wells Fargo Bank, N.A., a bank affiliate of Wells Fargo & Company.

**IMPORTANT:** The projections or other information generated by eMoney regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.

Wells Fargo is an Affirmative Action and Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, status as a protected veteran, or any other legally protected characteristic.

Wealth & Investment Management (WIM) offers financial products and services through bank and brokerage affiliates of Wells Fargo & Company.

Bank products and services are available through Wells Fargo Bank, N.A.

Investment products and services are offered through Wells Fargo Advisors. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC and Wells Fargo Advisors Financial Network, LLC, Members SIPC, separate registered broker-dealers and non-bank affiliates of Wells Fargo & Company.

Private Wealth is an exclusive and personalized service and product offering for qualifying clients of WIM. Products and services may have qualification or pre-acceptance requirements that are different than the Private Wealth eligibility requirements.

PM-10152027-5345877