Video transcript – Introducing AI Teammate

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Artificial intelligence is beginning to reshape how work gets done across wealth management.

At Wells Fargo, we're applying AI in ways designed to enhance the advisor experience.

Introducing AI Teammate. AI Teammate will connect data, tools, and workflows, bringing together the information advisors and their teams use every day.

Preparing for meetings, surfacing insights in real time, highlighting next steps to move relationships forward.

By streamlining that work, advisors will be able to spend less time on tasks and more time focused on clients.

Rather than introducing a separate tool, AI Teammate is built directly into the firm's Advisor Gateway platform, where advisors and their teams already manage their day-to-day work.

With AI Teammate, Wells Fargo is investing in AI to build for what's next, connecting the strength of the business to help advisors deliver more value for their clients.

AI Teammate features discussed are subject to change.
The examples and screens depicted in this video are for demonstration purposes only and are intended to illustrate how AI Teammate may assist users. Actual experiences, responses, available information, and functionality may vary. AI Teammate is a support tool and should not be relied upon as a substitute for independent review, judgment, or verification.
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