

September 2025

# Wealth and Investment Management Technology Platform Video

**[Illustrated graphics of technology, including computer screens, devices and desktop workspaces, primarily colored gold and shades of white, showcase new SaaS and digital platform tools.]**

>NARRATOR At Wells Fargo Advisors. We've committed over \$1 billion to modernizing advisor technology, and we continue to invest in innovative tools and platform enhancements to help clients reach their full financial potential. Start your day with Advisor Gateway, the platform that enables your progress with an integrated experience across all your channels. Track every interaction and opportunity with Salesforce, your hub for client relationship management and practice efficiency. Dive into account 360 for a complete view of household and account level data that's streamlined and customizable. Use FactSet to analyze portfolios, monitor markets, and make informed investment decisions all in one place. Plan with confidence using eMoney for goals and strategy come together through interactive financial scenario planning. And when it's time to meet, Client Review Center helps you deliver impactful, personalized portfolio discussions, complete with polished, client ready reports. Discover how Wells Fargo Advisors equips you with the technology, insights, and support to help you focus on what matters most: your clients.

**[Footage transitions to a full-screen white slate:]**  
**[Wells Fargo Wealth & Investment Management logo.]**

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