



Advisors

“Protection Planning: Legacy” Video Transcript

Investment and Insurance Products: ▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value

Your legacy is about making sure the people and causes that depend on you enjoy sustained support for generations. What if your legacy could impact generations? Do you want to transfer wealth to family, causes or charities, or both?

Taxes matter. Consider how the potential income tax-free death benefit of life insurance can help ensure your loved ones keep more. Not all assets are equal. It's important to carefully plan how your wealth can be transferred to the causes you care about in the most tax efficient manner. Carefully consider which assets should be left to charity and which should be left to your loved ones. Consider how the potential income tax-free death benefit of life insurance can help you maximize your legacy to your loved ones.

Protection Planning helps safeguard your portfolio from the unexpected and can provide additional security, confidence, and control of your wealth throughout life's WHAT IFs. Talk with your Financial Advisor for guidance on what kind of protection is right for you. Together, we can help plan for your life's WHAT IFs.

[Image on screen: Talk with us today. We can help with your Protection Planning.]

[Image on screen: Need help finding an advisor? Call us at 866-224-5708 or visit [wellsfargo.com/advisors.com](https://wellsfargo.com/advisors)]

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Insurance products are offered through non-bank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

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