“The Envision® Process” Video Transcript

Having a plan to help you get to where you want to go is crucial. Whether you want to choose the right career path or just l find the fastest way to the beach—planning is key.

The same is true in your financial life. That’s where our *Envision* planning process comes in. It can help you create a plan to help you meet your life goals with what’s most important to you being front and center. It’s easy to use and it may be different than other investment planning you’ve done in the past.

It starts with you identifying your goals and developing a plan around those goals with your advisor. Once your goals, priorities and finances are part of your plan you’ll receive an *Envision* plan result.

When the result is in the target zone you can have confidence you’re on track to reach your goals. And if expected, or unexpected, things happen in your life you can add or adjust your goals as needed.

So – no matter where the market is headed - you have a plan – and you can check on it from wherever you are. You also have the flexibility to try out a new dream anytime you want. And then you can work with your advisor to make your dreams part of your plan.

We want to make planning easy so it’s not something you have to do, but something you want to do. We are here to help you plan for your future and it starts with you and your goals.

We see the value in taking what’s most important to you and making those goals achievable. Isn’t it time you started planning for your life, not just your finances? If you want to learn more about the *Envision* process contact us today.

Important: The projections or other information generated by *Envision* 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. ***Envision*** **methodology:** Based on accepted statistical methods, the *Envision* tool uses a simulation model to test your Ideal, Acceptable and Recommended Investment Plans. The simulation model uses assumptions about inflation, financial market returns and the relationships among these variables. These assumptions were derived from analysis of historical data. Using Monte Carlo simulation the *Envision* tool simulates 1,000 different potential outcomes over a lifetime of investing varying historical risk, return, and correlation amongst the assets. Some of these scenarios will assume strong financial market returns, similar to the best periods of history for investors. Other will be similar to the worst periods in investing history. Most scenarios will fall somewhere in between. Elements of the *Envision* presentations and simulation results are under license from Wealthcare Capital Management LLC Wealthcare Capital Management LLC is a separate entity and not directly affiliated with Wells Fargo Advisors.

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