

## WELCOME TO ABBOT DOWNING

### **Jim Steiner, President of Abbot Downing**

When a client comes in, one of the things we really like to do is look at their family history. If you think about Augustine of Hippo, he had a wonderful quote. He said things past, things future all exist in things present. So for a client to understand their past – to go back 400 years and explain what that family history has been – is very powerful, and oftentimes their children haven't heard it. And so what it does is it really sets the stage for understanding wealth in a different way. It's a values-based understanding of wealth as opposed to just an economic understanding of wealth.

### **Jack Ginter, Senior Managing Director**

Today we've got relationships that are 80, 85 years old. We're working across multiple generations. Sometimes it's in a fourth generation with our families. So they typically start somewhere and grow over time, but always based on a relationship that they have with Abbot Downing and Wells Fargo.

### **Lisa Featherngill, Managing Director of Wealth Planning**

We've got great people who are very passionate about this business and very passionate about their clients in doing the best possible work for their clients.

Abbot Downing clients should know that they are being cared for, that their needs, their family needs are our main priority, and that we have their backs.

### **Doug Evans, Senior Managing Director of Asset Management**

We have wonderful conversations with our clients. It's a privilege to meet folks who, frankly, were the originators or the builders of industry that have led to a lot of the success that we're all able to enjoy today.

For us, as we work with those clients, I think a big part of our job that is incumbent upon us is to come forward with the data, to come forward with the education, to make it collaborative environment where we identify what we think are the most compelling themes – what we would consider immutable trends.

It's a complex task engaging all the myriad of activities required to tend to capital of this nature, it's unique wealth really. And as you think about that, you need to have a host of professionals that are going to come to you in a manner that is not just trustworthy because of the experience or the credentials, but really have a framework that allows them to be objective, that allows the process and the solutions to be transparent, which I think frankly is lost sometimes in our industry. You know at the end of the day having something that's holistic, something that can be customized, is a pretty powerful value proposition.

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