



## Why did Lakeview Partners form an independent wealth management practice?

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- As an independent practice, we have greater flexibility to make decisions that enhance our clients' experience. Independence allows us to adapt more quickly and tailor our services to meet our clients' specific needs, enabling us to deliver innovative and highly personalized solutions.
- Operating independently helps Lakeview Partners to manage costs more efficiently and pass those savings directly to our clients. These initial savings will be reflected immediately in our client fee schedules.
- Independence also allows us to place an even stronger emphasis on our fiduciary responsibilities, ensuring we consistently act solely in the best interests of our clients.

## Why did Lakeview Partners select Wells Fargo as our broker dealer and custodian?

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- More than 40 percent of our clients already trust Wells Fargo for their personal banking needs. As a result, asset transfers, income distributions, and account integrations can be smoother, faster, and more convenient.
- Wells Fargo Advisors Financial Network provides a comprehensive wealth management platform while allowing us the autonomy to manage our business, team, and client relationships according to our own standards and our clients' unique needs.
- Through Wells Fargo Advisors Financial Network, we have access to a broad range of products and services on behalf of our clients, including:
  - Investment, retirement, and estate planning strategies
  - Stocks, bonds, and mutual funds
  - Asset management accounts
  - Traditional and advisory portfolio-management services
  - Access to banking services through Wells Fargo affiliates
  - Insurance and annuities

Bank products and services are available through Wells Fargo Bank, N.A.

Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies

**Thank you for trusting us.**

We look forward to our continued partnership in this exciting new chapter.