

Ellis Wealth Management, LLC

Wells Fargo Advisors Financial Network

THE ESSENTIAL VALUE STATEMENT ©™



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Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN) Member SIPC, a registered broker-dealer and a separate non-bank affiliate of Wells Fargo & Company. Ellis Wealth Management is a separate entity from WFAFN

Going Beyond Wealth Management

Our Experience

The Wealth Management and financial advisory team of Ellis Wealth Management brings over 40 years of collective experience in the areas of wealth management, liability management, trust planning and world class investment management in partnerships with the Wells Fargo Advisors Financial Network (WFAFN).

Our Essential Value

We manage wealth through a unique process entitled “The Essential Experience”^{©™sm} in which we encircle the needs of the client, create and maintain efficiencies and simplify their lives.

Others may talk about partnership - we believe its *Essential* that you *Experience* it!

Our Clientele

The Ellis Group exclusively advises successful families, business owners and institutions.

Typically our clients are “family oriented professional delegators”.

These family oriented executives and professionals know the value of managing their affairs and are now proactively seeking the professional advice and attention to service we provide.

We Manage Risk *and* Guard your Values

Risk is managed within a total asset allocation framework of comprehensive planning inclusive of your values, coupled with strategic and tactical portfolio design and selection - incorporating the use of traditional and non traditional asset classes.

Growth of capital is important - keeping it is essential.

Passing on your values is your legacy, a legacy that can change the world.

Our Beliefs:

We believe:

It is essential that you work with accredited advisors who will provide you with timely ideas and creative solutions

It is essential that your advisory team is part of your personal board of directors

It is essential that your board of directors saves your most precious resource - Time.

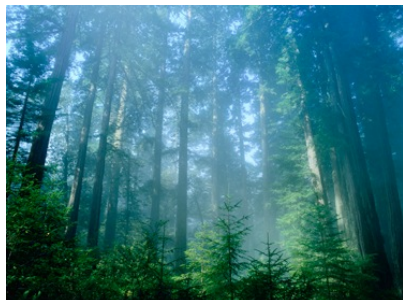
Enabling you to focus on what is most important to you - your family, your community and your career!

You Can Have It All

The intimacy of a boutique, the resources of a global world-class platform and the steadfast commitment of the family office.

WE VALUE YOU!

“The Essential Experience”©™



Honor the Past



Celebrate the Moment



Prepare for the Future

