

WELLS FARGO

The Private Bank

Please join us for an informational conference call.

# The Impacts of Politics on Policies, Portfolios, and Planning



An election year alone presents challenges and opportunities for investors and wealth planning due to the correlation between taxes and politics and the potential implications on the markets. The Tax Cuts and Jobs Act that became effective January 1, 2018 roughly doubled the 2017 exemption value for the estate tax however, the longevity of this exemption is unknown. It sunsets December 31, 2025 and could possibly be repealed by a future Congress and President before then. While many prepare for their final life events by carefully constructing estate plans, changes in administrations can result in uncertainty and delayed planning due to potential tax law reform.

Join this discussion for an update on the markets, tax and policy proposals, and what to consider.

Hosted by:

**The Santa Barbara Estate Planning Council**

Moderated by:

**Scott Hansen**

*Regional Managing Director*  
Wells Fargo Private Bank

Featured Speakers:

**Marc Doss**

*Regional Chief Investment Officer*  
Wells Fargo Private Bank

**Chris Pegg**

*Senior Director of Planning*  
Wells Fargo Private Bank

## Tuesday, October 27, 2020

4:45 - 6:00 p.m. PST

### Zoom Video Webinar

The link and login will be sent the prior Tuesday of the event (October 20th) in the reminder message.

4:45PM - 5:00PM *Important updates for SBEPC members*

5:00PM - 5:45PM *Speaker event*

5:45PM - 6:00PM *Q&A session*

## Featured Speakers



### **Marc Doss, CFA<sup>®</sup>, CFP<sup>®</sup>**

*Managing Director, Regional Chief Investment Officer*  
**Wells Fargo Private Bank**

Mr. Doss is the regional chief investment officer and a managing director for Wells Fargo Private Bank in the Western Region. Marc leads a team of investment professionals who deliver comprehensive, custom, diversified portfolio management for clients of The Private Bank. In his role, he serves as the investment thought leader in the region by providing insight and interpretation of the economy and financial markets at client events and through written commentary. Marc serves on the Wealth Investment Policy and Fiduciary Oversight Committee.



### **Chris Pegg**

*Senior Director of Planning*  
**Wells Fargo Private Bank**

Chris is the senior director of planning for the Western region of Wells Fargo Private Bank. Mr. Pegg leads a team of 30 wealth planning managers, strategists and planners who develop and implement custom wealth plans for clients based on a thorough understanding of each client's personal values and vision for their legacy. Chris speaks and writes frequently on matters relating to tax law and wealth planning and has been quoted on multiple occasions in the New York Times and other national publications.

This conference call is being provided for educational and informational purposes only and is not a solicitation or an offer to buy any security or instrument or to participate in any planning, trading or distribution strategies. Past performance is not a guarantee of future results and there is no guarantee that any forward looking statements made during this call will be attained.

Wells Fargo & Company and its affiliates do not provide legal or tax advice. Please consult your legal and/or tax advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your own situation at the time your tax return is filed.

---

**Investment and Insurance Products:**

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

If you prefer not to receive email

messages from Wells Fargo regarding products, services and events, please notify your relationship manager.

Wells Fargo Private Bank provides products and services through Wells Fargo Bank, N.A. and its various affiliates and subsidiaries. Wells Fargo Bank, N.A. is a bank affiliate of Wells Fargo & Company.

Brokerage products and services are offered through Wells Fargo Advisors. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

**Wells Fargo Bank, N.A. offers various advisory and fiduciary products and services including discretionary portfolio management. Wells Fargo affiliates, including Financial Advisors of Wells Fargo Advisors, a separate non-bank affiliate, may be paid an ongoing or one-time referral fee in relation to clients referred to the bank. The bank is responsible for the day-to-day management of the account and for providing investment advice, investment management services and wealth management services to clients. The role of the Financial Advisor with respect to the Bank products and services is limited to referral and relationship management services.**

Wells Fargo seeks to comply with state and local regulations concerning the entertainment of public officials and employees. Therefore, to the extent you are required by the rules and regulations or the policy of your department, agency, or authority to pay any part of the costs of attending this event, please email [WMP2P@wellsfargo.com](mailto:WMP2P@wellsfargo.com) so that we may make the necessary arrangements.

© 2020 Wells Fargo Bank, NA. Member FDIC. NMLSR ID 399801 WCR-0820-00262

CAR 0720-02826

