

Customer Privacy Policy

Wells Real Estate Funds, Inc.

Wells Investment Securities, Inc.



Wells values your business and the confidence that you place in us. Protecting the privacy and confidentiality of your nonpublic personal information is of the highest importance to the way we conduct our business.

We want you to be aware of the kinds of information that we collect about you and how it is used.

Kinds of nonpublic personal information we collect

We collect only information that is needed to administer our business and to serve you and your account. This can include:

- Information that you provide on applications, forms, and other correspondence, or information that you give us verbally.
- Data such as your name, Social Security number, address, phone number, assets, income, date of birth, and occupation.
- Transactional information such as your account numbers, account balances, transaction details, and other financial information. This can include transactions with us, our affiliates, or other entities.
- Third-party information about you, such as data provided by your broker, financial planner, or other professional whom you hire.

How we limit and control use of your information

In order to protect your privacy, we carefully control how information about you is shared with other parties.

- We do not disclose nonpublic personal information about you or former customers, except as permitted or required by law. The law permits us to share information about current or former investors with our affiliates, advisors, subadvisors, transfer agents, broker/dealers, administrators, or any firms involved in providing the products and services you receive from us. For example, we share information about your account with outside vendors so that your account statements can be printed and mailed. However, these parties are not permitted to release, use, or transfer your information to anyone else.
- Our employees and contractors must adhere to strict policies and procedures to prevent any misuse of your nonpublic personal information. Employees are bound by this privacy policy and are educated on implementing security principles and practices.
- We maintain physical, electronic, and procedural safeguards that comply with regulatory authorities standards to guard information about you. Our operational and data processing systems reside in a secure environment that protects nonpublic personal information from being accessed inappropriately by third parties.

This privacy policy notice applies to all investment products offered through Wells Real Estate Funds, Inc.; Wells Investment Securities, Inc.; and other Wells affiliates. We believe that protecting your privacy is the cornerstone to creating a trusting relationship, and we hope you take comfort in knowing our policies. If you have questions, please call 800-557-4830 to speak with a Wells Client Services representative.

SIPC Disclosure

Wells Investment Securities, Inc. is a member of SIPC, the Securities Investor Protection Corporation. The SIPC acts where possible to assist in the recovery of missing securities. SIPC coverage does not apply if the investment is not registered with the Securities and Exchange Commission under the Securities Act of 1933, and it does not protect against losses due to market fluctuations. You may obtain more information about the SIPC, including the SIPC brochure, by contacting the SIPC at www.SIPC.org or by calling 202-371-8300.