

U.S. Bank Private Wealth Management for Deloitte Partners, Principals and Managing Directors

Managing your personal financial goals while adhering to your independence requirements

In your demanding profession, finding time to handle your financial affairs can be a challenge. As a preferred DWealth Advisory firm, our goal is to simplify your financial life. We have experience advising professional service firm executives and understand your compensation structure along with the nuances of your independence and regulatory commitments.

Discover how we can help you work towards building and sustaining your wealth to align with what's most meaningful for you and your family.



Personal contact — with access to a multitude of professionals

With U.S. Bank Private Wealth Management, you'll benefit from a single point of contact — your Private Wealth Advisor. After working together to truly understand your family's objectives and priorities, your advisor will orchestrate a team of professionals that specialize in a comprehensive suite of financial services including:

- Wealth planning
- Investment management
- Trust and estate administration
- Private banking
- Insurance¹

This approach gives you the ease and convenience of working with a primary advisor while capitalizing on the extensive knowledge of our entire team to help as you work towards your specific financial goals.

¹ Insurance products and services provided through our affiliate U.S. Bancorp Investments. See disclosure on U.S. Bancorp Investments, Inc., on page 2.

Our unique DWealth offering employs:

A robust, customized portfolio construction process that is responsive to your independence requirements.

An open architecture platform to ensure access to compliant securities and funds across all asset classes.

A continuous portfolio monitoring system that ensures compliance with independence requirements.

A highly integrated view that includes "qualified" and "non-qualified" assets.

A competitive fee structure.

Investment and insurance products and services including annuities are:

NOT A DEPOSIT • NOT FDIC INSURED • MAY LOSE VALUE • NOT BANK GUARANTEED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY

A legacy of strength, stability and integrity

As a Deloitte professional, you understand the need for strength and stability in a financial institution.

U.S. Bank's legacy of serving in a fiduciary capacity in our personal trust business is built on more than 100 years of putting our clients' interests first. Our dedication to transparency and making ethical decisions is at the core of what we do. As your partner, we always focus on doing what's best for you.

Take the next step

With U.S. Bank Private Wealth Management, you get a committed partner who will develop a custom wealth plan that addresses your needs now and into the future. Contact us today to learn how our comprehensive product and service suite can be customized for your unique goals.

Contact us today

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*U.S. Bank named one of
the World's Most Admired
Companies for the 14th
consecutive year.*

—Fortune, February 2024²



² Fortune Magazine, February 2024. For more information on Fortune's World's Most Admired Companies award go to <https://fortune.com/franchise-list-page/methodology-worlds-most-admired-companies-2024/>

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U.S. Bank does not offer insurance products. Insurance products are available through our affiliate U.S. Bancorp Investments.

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