

# Creating a better banking experience together

## Personalized banking strategies that work in harmony with your wealth plan

You've worked hard to support yourself and your family. Developing efficient cash management and financing strategies can help ensure that your money is also working hard for you. Effective banking strategies can help you take advantage of growth opportunities and play an important role in your overall wealth plan.

As your partner, U.S. Bank Private Wealth Management can assist you in developing strategies to optimize the management, preservation, and growth of your working capital. We accomplish this by:

- Recognizing your financial goals and what is important to you
- Creating strategies for maintaining financial access while exploring new opportunities
- Using customized credit options that are tailored to your specific needs
- Offering solutions to help you streamline your daily banking activities and complement other aspects of your financial life

## Dedicated to you and your banking needs

Your Private Wealth Banker will help you select the best banking options based on your specific situation while providing access to a variety of exclusive benefits and services. Feel confident the exceptional client service you receive from your banker is backed by the world-class capabilities of U.S. Bank.



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

– Fortune, February 2024

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

**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 breadth of capabilities

Our banking products are designed to address your personal and professional financial needs. Your banker can advise you on creative ways to manage both your assets and liabilities as you work toward specific objectives. Our products and services include:



#### Personal

- Individualized banking strategies
- Mortgage services, including jumbo loans
- Home equity lending
- Secured lines of credit and loans, including Liquid Asset Secured Financing
- Yacht and aircraft loans
- Insurance premium financing



#### Secure access

- Convenient 24/7 account management
- Online and mobile banking
- Credit card products
- Debit card<sup>1</sup> with no ATM transaction fees<sup>2</sup>
- Bill pay
- Mobile check deposit
- Dedicated call center

With years of banking experience, we are well-capitalized and well-equipped to respond to your day-to-day banking needs. And with online and mobile banking, and phone support from our dedicated call center, we're always here and ready to assist.

Contact your Private Wealth Banker or visit [usbank.com/wealth-management/deloitte](https://usbank.com/wealth-management/deloitte) today to help ensure that your cash assets are always working as hard as you do.

---

Julie Broadwell, Vice President  
Sr. Private Wealth Advisor  
office: 513-632-2584  
cell: 513-978-4904  
[julie.broadwell1@usbank.com](mailto:julie.broadwell1@usbank.com)

<sup>1</sup> Must have an eligible debit card from U.S. Bank Private Wealth Management. The issuer of the debit card is U.S. Bank National Association, pursuant to a license from Visa U.S.A. Inc. Other restrictions may apply.

<sup>2</sup> ATM transaction fees at both U.S. Bank owned and non-U.S. Bank owned ATMs will be reversed. Not all ATMs accept deposits.



Mortgage, Home Equity and Credit products are offered by U.S. Bank National Association. Loan approval is subject to credit approval and program guidelines. Not all loan programs are available in all states for all loan amounts. Deposit products offered by U.S. Bank National Association. Member FDIC.

U.S. Bank does not offer insurance products but may refer you to an affiliated or third party insurance provider.