

Protect those you love, today and tomorrow

Working towards a better future for those who matter most

Building a legacy that lives on and provides for your loved ones takes years of hard work. It involves thoughtful planning to strive to protect your wealth now and into the future. Although not always an easy task, creating a forward-thinking trust and estate strategy can be a critical component to ensure that your plan reflects your vision and values.

At U.S. Bank Private Wealth Management, we understand the many complexities associated with trusts and estates and we're prepared to guide you as we bring your future into focus.



Turn to a trustworthy, experienced partner

With over a century of complex trust and estate administration experience, we understand wealth preservation and distribution. Regardless of how basic or complex your needs may be, we'll always address them with your best interests in mind.

Building a plan for your goals

The first step in your trust and estate plan is determining what matters most to you. Over the years, as we administer your plan, taking care of you and your family with the utmost integrity is at the center of our fiduciary relationship. The advantage of working with U.S. Bank Private Wealth Management comes down to three key factors: expertise, objectivity and continuity.

*U.S. Bank has been named
one of the World's Most
Ethical Companies® for the
tenth consecutive year.*

– Ethisphere Institute, February 2024*

U.S. Bank named one of the "World's Most Ethical Companies®" Ethisphere Institute, February 2024 (also 2015–2023); for more information about the "World's Most Ethical Company" designation and scoring methodology, please visit www.worldsmostethicalcompanies.com.

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Investment products and services are:

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

- **Expertise:** We've been serving as trustee and administering trusts for individuals like you for more than 100 years. We take the time to understand your unique needs and work with your tax and legal advisors to help ensure that your trust and estate plans are designed to complement your overall wealth goals.
- **Objectivity:** Being an independent fiduciary partner enables us to execute your plan without the conflicts of interest or pressure that a close family member or friend may encounter.
- **Continuity:** Year after year, generation after generation, you can count on us to honor your plan.

By listening intently to your goals and priorities, your trust officer can work with your attorney to help you determine the right structure for your trust and estate plan. Options may include a will, trust, private family foundation or specialty assets such as: mineral and timber interests, farm land or closely held private companies.



Count on our broad-based capabilities

As you pursue your financial goals, you can feel confident that our professionals can guide you in a variety of critical financial matters including:

- **Asset management:** Assuring that assets are invested in ways that are consistent with your investment objectives and intent
- **Estate planning:** Working with you and your key tax and legal advisors to help ensure that the estate plan is comprehensive and properly documented
- **Tax management:** Assuring delivery of tax information for personal income tax filing purposes; filing tax returns for irrevocable trusts and providing required documentation to beneficiaries
- **Privacy maintenance:** Protecting personal matters from public, including beneficiaries, inspection by utilizing silent trusts, statement waivers and sealed court documents to avoid court accountings
- **Philanthropic planning:** Helping coordinate arrangements for gifting to charitable organizations
- **Situs considerations:** Guidance on options regarding governing state law for irrevocable trusts

Our commitment to you

We're dedicated to honoring the intent of thousands of clients like you who have entrusted us with their trust and estate plan administration. Our fiduciary commitment remains in place throughout our relationship, ensuring that we'll always act in your best interests.

Contact your Private Wealth Advisor or visit usbank.com/wealth-management/deloitte to discover how you can set the course for your financial future.

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U.S. Bank and its representatives do not provide tax or legal advice. Each individual's tax and financial situation is unique. Individuals should consult their tax and/or legal advisor for advice and information concerning their particular situation.

Non-financial specialty assets, such as real estate, farm, ranch and timber properties, oil, gas and mineral interests or closely-held business interests are complex and involve unique risks specific to each asset type, including the total loss of value. Special risk considerations may include natural events or disasters, complex tax considerations and lack of liquidity. Specialty assets may not be suitable for all investors.