

Wealth planning with purpose

Create meaningful impact for your future

Achieving financial success isn't simple. It's more than a matter of working hard and saving. It also takes thoughtful planning to create real impact for the people and causes that mean the most to you. Taking a closer look at what's important to you and your loved ones can help guide you through many significant financial decisions.

As you focus in on your wealth goals, developing a sound strategy today can help you increase your impact tomorrow. U.S. Bank Private Wealth Management is here to help you with your goals of building and preserving wealth so that you can pursue your vision for the future.



Fully comprehensive, fully customized

With U.S. Bank Private Wealth Management, you'll benefit from a single point of contact who has access to a dedicated team of professionals. Our specialists offer banking, trust, planning and investment strategies. Once we fully understand your objectives and priorities, we can develop a custom, individualized wealth plan based on your goals.

Understanding what matters to you

Together, we'll uncover your specific goals to design your custom plan, which can help bring clarity and confidence to your financial life. Strategies tailored to your family's unique situation that go beyond investments and retirement may help create, grow and protect your wealth so you can strive to have the greatest impact on those areas of your life that matter most to you. We'll continually monitor and adapt your plan to help ensure that you are well-positioned as your financial needs and objectives evolve.

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

– Fortune, February 2024

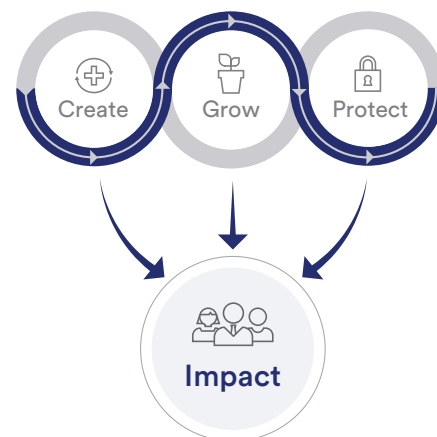
*For more information on the World's Most Admired companies award, visit <https://fortune.com/franchise-list-page/methodology-worlds-most-admired-companies-2024/>.

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

Whether it's helping your children with the purchase of their first home, securing your family's future or realizing your philanthropic vision, our unique goals-based planning helps ensure your legacy is fulfilled based on how you want to impact your family and the community you live in. Your plan serves as a road map to help guide you toward your goals to:

- **Create.** Your journey begins with wealth creation through your business, job, inheritances or other ventures.
- **Grow.** A sound wealth plan, based on your risk tolerance, can set you on the path to potential asset growth.
- **Protect.** Future events are difficult to anticipate – help protect yourself and your family against the unexpected as you continue to pursue your goals.
- **Impact.** Increase the impact of your thoughtful planning by directing your assets toward the people and causes in your life that matter most.



Building for your future together

We believe successful wealth planning always focuses on what matters to you and your family. No matter what your vision of success looks like, we're here to help. Contact your Private Wealth Advisor or visit usbank.com/wealth-management/deloitte to discover the approach best suited to your evolving wealth planning needs.

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