

# Thoughtful customized investment strategies for you

Investment Management for  
Deloitte Partners, Principals  
and Managing Directors

## Our primary goal is helping you work toward your vision of success

Like many accomplished individuals, you may be looking to align your wealth with the many goals you'd like to achieve — now and into the future. You'll need a partner that can offer objective and unbiased advice. As a preferred DWealth advisory firm we'll work with you to define your vision of financial success and help you remain Independence compliant as we create and manage your custom investment portfolio.



## Our approach to make possible happen

For many years, our investment professionals have helped people like you define their goals of building and preserving wealth. Our disciplined approach emphasizes long-term growth and income generation while attempting to minimize risk. We develop customized investment strategies designed to help weather unpredictable conditions. These investment portfolios are monitored through the Broker Data Import Program and the Tracking & Trading System to comply with your Independence requirements. You'll experience:

- Unmatched access to sophisticated strategies across a broad spectrum of asset classes, including fixed income, equities/stocks, commodities and real estate
- Customized managed strategies comprised of rigorously researched mutual funds, exchange-traded funds (ETFs) and/ or individual securities, which are all compliant with Deloitte's Independence requirements
- Disciplined security selection and due diligence processes executed by our knowledgeable and experienced specialists
- National expertise delivered by a local team of investment professionals
- Access to detailed investment information such as, timely market commentaries and online account access

Define your vision  
of financial success.

[usbank.com/deloitte](https://usbank.com/deloitte)

Investment products and services are:

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

## Personalized portfolio construction through collaboration

Your Private Wealth Advisor and Portfolio Manager, backed by team of specialized investment professionals, will develop a personalized investment strategy based on your needs, preferences, tax sensitivity, risk tolerance and time horizon. Together we'll:

- **Establish your foundation.** This is the starting point from where we'll use our expertise and understanding of historical risk/returns for each asset class to create a plan that pursues returns at your preferred level of risk.
- **Explore your options.** We'll sift through the vast universe of investment categories to identify the ones we believe offer the greatest potential for returns.
- **Craft a personalized portfolio.** Designed to reflect your individual goals, preferences and values, your dynamic plan will be reviewed on an ongoing basis to respond to market conditions, potentially capitalize on unique opportunities and assure compliance with your independence requirements.



## We earn your trust by doing the right thing

At U.S. Bank Private Wealth Management, you're our priority and we act solely in your best interests at all times. Our fiduciary commitment remains in place throughout our entire relationship. We're always here when you need us with 24-hour phone, online and mobile support. Contact us to learn how our personalized investment management strategies may benefit you.

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**Past performance is no guarantee of future results.** Diversification and asset allocation do not guarantee returns or protect against losses.

Investments in **fixed income securities** are subject to various risks, including changes in interest rates, credit quality, market valuations, liquidity, prepayments, early redemption, corporate events, tax ramifications and other factors. Investment in fixed income securities typically decrease in value when interest rates rise. This risk is usually greater for longer-term securities. Investments in lower-rated and non-rated securities present a greater risk of loss to principal and interest than higher-rated securities. **Equity securities** are subject to stock market fluctuations that occur in response to economic and business developments. There are special risks associated with an investment in **commodities**, including market price fluctuations, regulatory changes, interest rate changes, credit risk, economic changes and the impact of adverse political or financial factors. Investments in **real estate securities** can be subject to fluctuations in the value of the underlying properties, the effect of economic conditions on real estate values, changes in interest rates and risks related to renting properties (such as rental defaults). **Mutual fund investing** involves risk and principal loss is possible. Investing in certain funds involves special risks, such as those related to investments in small- and mid-capitalization stocks, foreign, debt and high-yield securities and funds that focus their investments in a particular industry. Please refer to the fund prospectus for additional details pertaining to these risks. **Exchange-traded funds (ETFs)** are baskets of securities that are traded on an exchange like individual stocks at negotiated prices and are not individually redeemable. ETFs are designed to generally track a market index and shares may trade at a premium or a discount to the net asset value of the underlying securities.



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