US Private Wealth Management
U.S. Bank

Investment Management for Deloitte Partners, Principals and Managing Directors

Thoughtful customized investment strategies for you

Our 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

U.S. Bank Wealth Management and Investment Services has more than $401 billion in assets under management[1]

[1]Figure as of Q2 2022.

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

Personalized portfolio construction through collaboration

Your Private Wealth Advisor and Portfolio Manager, backed by a 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 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 identify options we believe may offer you the greatest potential for returns, drawing from the full range of investment categories available in today's marketplace.
- **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 or potentially capitalize on opportunities.

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 phone, online and mobile support 365 days a year.

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