



The Private Client Group



Features and Benefits

The Private Client Group delivers sophisticated solutions to meet various financial planning, banking, investment, insurance and personal trust needs.



The beauty of working with The Private Client Group at U.S. Bank lies in our streamlined and coordinated approach where solutions are delivered through a single point of contact, backed by a team of experts. We work with you and your family to understand your financial needs and deliver comprehensive solutions. This approach is offered exclusively to our clients with more than \$100,000 in invested assets with U.S. Bancorp Investments, Inc. or \$250,000 in qualified balances with U.S. Bank.

Being a client entitles you to an array of customized products and exclusive service features that have been developed especially for affluent clients such as yourself.

Your Team and Resources



We build a personal, long-term relationship with you to help you realize your dreams.

Dedicated Team

Your dedicated team includes a Private Banking Relationship Manager and a Financial Advisor who will bring in experienced partners from other U.S. Bank business lines where appropriate. We'll get to know you to understand your financial needs and then use that knowledge to deliver customized solutions. Plus, we're backed by the strength and stability of U.S. Bank.

Exclusive Phone Access

You'll enjoy exclusive access to the private client connect line and Investments Connect where seasoned banking associates and financial consultants can assist you with your day-to-day banking and investment needs. Immediately reach a banker with the private client connect line at 800-236-7700 or an investment consultant with Investments Connect at 800-888-4700. Both lines offer extended hours.

INSIGHT newsletter

Looking for information on the industry's key financial topics? Every quarter, you'll receive our INSIGHT newsletter electronically!

Banking Products and Services

Platinum Package Eligibility

As a client, you are eligible to receive our best in class Platinum Package that offers preferred rates, complimentary money orders and money market savings account, official checks, travelers checks, stop payments and incoming wires.

Immediate Funds Availability

Your deposited funds will generally be available immediately when deposited into your account either at a branch or through an ATM.

Complimentary Private Client Checks

You'll receive complimentary, custom The Private Client Group branded checks and check card.

Customized Credit Solutions

Your credit needs don't always fit the mold and we understand that. Therefore you may be entitled to enhanced underwriting processes, special rates and waived fees.

Investment Strategies

You have unique investment needs and The Private Client Group entitles you to extensive investment services offered through an expert financial advisor. Our services include complimentary financial planning, a portfolio analysis and a beneficiary review. In addition, you will enjoy a complimentary asset management account including identity theft protection along with other premier service offerings such as discounted trades and preferred margin rates.



For more information or to inquire about membership with The Private Client Group, visit your local branch or call the private client connect line at 800.236.7700.

All of  serving you®

 **private client connect line 800.236.7700**
theprivateclientgroup@usbank.com

Investment products and services are available through U.S. Bancorp Investments, Inc., member FINRA and SIPC, an investment adviser and a brokerage subsidiary of U.S. Bancorp and affiliate of U. S. Bank.

Insurance products including annuities are available through U.S. Bancorp Insurance Services, LLC , and U.S. Bancorp Investments, Inc.; in Montana, U.S. Bancorp Insurance Services of Montana, Inc.; and in Wyoming, U.S. Bancorp Insurance & Investments, Inc. All are licensed insurance agencies and subsidiaries of U.S. Bancorp. Policies are underwritten by unaffiliated insurance companies and may not be available in all states.

NOT FDIC INSURED	MAY LOSE VALUE	NOT GUARANTEED BY THE BANK	NOT A DEPOSIT
NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCIES			



Deposit products offered by U.S. Bank National Association. Member FDIC. Credit products are subject to normal credit approval.