



U.S. Bank – Private Client Reserve Financial Planner

The Private Client Reserve of U.S. Bank offers creative, forward-thinking and timely strategies to help successful individuals and families accomplish their goals. For generations, we've helped our clients realize their dreams by helping them with their goals of growing, managing, protecting and transferring their wealth. We understand that complex wealth issues demand comprehensive solutions. That's why we've assembled teams of experts with a full array of solutions including financial planning, investment management, personal trust administration, private banking, insurance services, legacy and philanthropy. To learn more about The Private Client Reserve and our offerings, please visit our website at: <http://privateclientreserve.usbank.com>

OVERVIEW:

The Private Client Reserve Financial Planner delivers best-in-class custom planning of: asset allocation, wealth management, retirement planning, education funding, estate planning, tax strategies, investment planning, stock option analysis, executive planning and business succession planning for high net worth clients.

RESPONSIBILITIES:

- Collaborate with each client to develop a specific financial analysis tailored with suggested solutions designed to meet the client's goals and objectives.
- Educate and advise on advanced estate planning strategies and coordinate with the client's outside advisors.
- Prepare and present seminars on planning topics for clients, potential clients, and professionals.
- Work as part of a team of highly experienced and service-oriented Wealth Management Professionals.
- Continually focus on retaining the client group, as well as gaining new clients through referrals and contacts in the community, to perpetuate the growth of the Private Client Reserve.

QUALIFICATIONS:

- Bachelor's degree, or equivalent work experience
- Three-to-five years of recent wealth planning and/or related consulting, accounting, or legal experience with a well-regarded bank, investment, law or accounting firm structuring complex estate and financial planning transactions for clients with net worth exceeding \$3 million and directly advising clients on the same
- Professional designation such as CPA, JD, or CFP preferred
- Ability to independently analyze, structure, and review financial planning documents
- Ability to independently address and provide solutions to administrative and tax issues in managing assets subject to such techniques
- Knowledge of operating entities typically used for estate planning purposes, including, but not limited to Limited Liability Partnerships, Limited Liability Corporations, C & S Corporations
- Ability to analyze and provide solutions relative to stock options and executive compensation plans
- Strong problem-solving and analytical skills
- Leadership and relationship management skills indicative of the potential to advance to greater responsibilities in the future
- Excellent interpersonal, verbal and written communication skills
- Excellent presentation skills

Wealth Management is the fastest growing division of U.S. Bancorp (U.S. Bank). In 2011 U.S. Bank delivered record results and is on track to achieve even better performance in 2012. We are the fifth largest bank in the US, and a leader of the industry by virtually every measure of financial performance, strength and stability. In 2011 Fortune magazine named U.S. Bank the Most Admired Superregional Bank, and the fifth Most Admired Company in Management Quality in the world.