

Planned Giving

Fundraising is central to everything your nonprofit organization does. We support your efforts with services designed to help your organization thrive.

Proper management of the finances of your nonprofit organization is central to its success. The professionals in our Charitable Services Group are focused on helping build your planned giving program by applying their expertise to the management and administration of those assets. You can focus on donor relationships while we handle back-office functions and compliance matters.

A Charitable Services Relationship Manager will work with your organization to help you manage your most important financial needs.

Planned giving consultation

We recognize that not only is effective management of your assets vital, but so is the ability to attract new assets. We'll advise you on the structure of potential gifts and procedures for the proper transfer of unusual assets. We can also share industry trends that keep you up-to-date on best practices related to planned giving.

Gift administration

We help assure proper compliance oversight of charitable trusts and gift annuity pools. Our professionals can manage distributions, and provide tax reporting, annual valuations, trust and annuity accounting and state annuity reporting.

Donor services

To help you maintain strong relationships with donors, your most important resource, we provide seamless and responsive service through tailored donor communications. We create customized reports and communications branded with your messaging that you can provide to your donors.

Asset management services

You value each dollar you raise, and you want to get the most from it. We offer a broad range of non-proprietary and diversified investment options. A dedicated Portfolio Manager works with you, utilizing sophisticated asset allocation strategies and cash flow planning to structure investment strategies specific to your organization's needs. You'll receive regular performance reports and have access to comprehensive online tools to track progress. Assets are held in trust account(s), providing strong controls in addition to clear audit trails and integrated tax reporting. Trust and annuity reserve assets are invested consistent with applicable regulations.

Alternative asset administration

In today's world of planned giving, it is important to have the capability to receive and manage gifts of real estate, farm and ranch land, timber property and mineral rights. Our nationwide resources make it possible for your organization to accept many types of complex gifts in order to broaden your donor base.

The unique value of working with our Charitable Services Group

We've been providing dedicated services to charitable organizations since 1991 by recognizing their unique needs and building an organization to serve it. One client said that our group "was like an extension of their staff." It is a confirmation of our goal, which is to support organizations like yours so you can fulfill your charitable mission.

Our Charitable Services Group supports organizations whose missions encompass causes as far ranging as the arts, medical research, education, poverty, the environment and many other social issues.

Our team is dedicated to delivering the services you need to help improve your organization's financial position.



Investment products and services are:

NOT A DEPOSIT	NOT FDIC INSURED	MAY LOSE VALUE	NOT BANK GUARANTEED	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
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U.S. Bank Wealth Management

Find out more today

If your organization is serious about building and managing its assets, now is the time to take advantage of our financial capabilities, sophisticated product choices and commitment to planned giving.

Contact your U.S. Bank financial professional to find out more about our exclusive products and services.



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