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WEALTH TRANSFER



Working with you to realize your philanthropic vision

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Sharing your wealth is not only a fulfilling endeavor, but it can be a vital part of your overall financial strategy. In today's increasingly complex financial, legal and tax environment, it makes sense to enlist the support of experienced professionals who can guide your giving strategy and strive to make it as effective as possible. U.S. Bank offers comprehensive support to help fulfill your specific philanthropic goals. Our expertise can be critical in helping you develop a more strategic approach to giving that can work to your long-term benefit and those of your targeted recipients.



Check out our commentary on options available to help you fulfill your philanthropic vision.

Donor Advised Funds: Allows you to place a wide range of assets into a charitable vehicle and claim a tax deduction, to the extent allowable, in the year the gift is made. Learn more

Private Foundations: A charitable option that allows more direct control of the investments as well as the grants and scholarship awards. Private foundations can be designed to last a fixed period of time or in perpetuity and can be controlled by your heirs.

Planned Giving: A method of supporting non-profits and charities that allows donors to make larger gifts than they could make on their current income. Learn more

Endowments: Perpetual funds designed to provide income with the goal to grow the principal for a charitable institution. Learn more

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Important Disclosures

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

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