U.S. Bank – Private Wealth Management
Private Wealth Consultant (Business Development Officer)

Private Wealth Management 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: https://privatewealth.usbank.com/

OVERVIEW:
The Consultant will focus on selling U.S. Bank's Wealth Management trust and investment management services to high net worth clients, such as corporate executives, business owners, and multi-generational family trust through internal and external channels.

RESPONSIBILITIES:
- Identifies new client opportunities through internal and external channels, focusing on High Net Worth clients, such as corporate executives, business owners and multi-generational family trust.
- Consults with prospective clients about their financial goals, needs and identifies, and promotes U.S. Bancorp products and services to best meet those needs, as well as expand and retain existing relationships.
- Follow through with new client until close.
- Work with internal sources to promote and support new business opportunities.
- Actively cross-sells appropriate banking products to new and existing customers and refer clients to other U.S. Bancorp business units as appropriate.
- Maintain an active prospect database.
- Remain current on industry trends, market activities, and competitive practices.
- Maintain active participation and membership in community and industry organizations.
- Acts as a mentor and consultant for teammates on business developments, team optimization and market strategy within Private Wealth Management.

QUALIFICATIONS:
- Bachelor's degree, or equivalent work experience
- Five or more years of sales experience in financial sales industry
- Graduate degree and/or professional designation such as CFP, CFA, CPA, CTFA, or JD is preferred
- Proven new business development and sales skills
- Ability to build partnerships and work as part of a team
- Excellent presentation, interpersonal, verbal and written communication skills
- Professional designation preferred, such as CFP, CFA, CPA, CTFA, or JD
- This position requires experience working with High Net Worth clients doing holistic planning for them
- Must be experienced in income and estate tax considerations, investment structure, asset allocation, banking solutions, philanthropic strategies, concentrated wealth techniques and family legacy advisory services
- This person will also serve as a consultant to the Private Wealth Management team on topics including product development, team optimization and market strategy. Senior level business person and widely recognized business development expert throughout Private Wealth Management

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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.