



## U.S. Bancorp Investments Launches Automated Investor

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*Online and mobile customers receive new experience with Automated Investor*

MINNEAPOLIS--(BUSINESS WIRE)--Jun. 20, 2018-- Responding to customers' desire for smart, easy-to-use and safe digital investment tools and strategies, U.S. Bancorp Investments announced today the launch of its new Automated Investor offering.

"We are committed to serving customers where they are today and will be in the future, and that includes embracing robust technologies. **Automated Investor** provides an easy-to-use digital advice platform with the power of our investment expertise through U.S. Bancorp Investments. We believe this will be valued by those who desire a technology-enhanced investment experience, supported by personalized service 24/7. Customers will now be able to have that experience with greater confidence as a result of working with a trusted institution," said Mark Jordahl, president of U.S. Bank Wealth Management.

U.S. Bancorp Investments has partnered with FutureAdvisor, an investment advisory firm owned by BlackRock, to develop Automated Investor. This automated investing offering brings together the capabilities of FutureAdvisor's technology platform in a secure online environment with investment strategies and personalized service from U.S. Bancorp Investments.

The investment portfolios within Automated Investor have been created by wealth management professionals and consist of cost-effective funds specifically designed to help clients work toward their unique goals. The technology seeks to optimize returns and help minimize risk, and automatically rebalances investments as the markets change, all with low management fees. Users can receive a free analysis of their current investments to see how they are performing and how they can potentially improve. Automated Investor is now available to customers via [usbank.com](http://usbank.com) and mobile, allowing users to easily track progress against their goals.

"For the emerging affluent customer or the younger investor who may benefit from straight-forward portfolio strategies, Automated Investor can be a great fit," Jordahl explained. "All customers need to do to get started with the Automated Investor program is to visit [usbank.com/automatedinvesting](http://usbank.com/automatedinvesting) or log into [usbank.com](http://usbank.com) or the mobile app and look for the Automated Investor message on their dashboard. Once there, they answer a few simple questions and have the option to securely link their choice of investment accounts, including accounts at other institutions. From there they will see a projection of their account balances, along with a confidence level of meeting stated objectives and highlighted areas where investments could be improved."

"Digital advice platforms will continue to transform how consumers work with advisors and engage with their investments. We are proud to partner with U.S. Bancorp Investments to add the scale, simplicity and cost efficiency of FutureAdvisor's technology. The combination of digital and human advice, packaged appropriately together, can improve outcomes for both financial advisors and their clients," said Robert Goldstein, chief operating officer of BlackRock.

Automated Investor is part of U.S. Bancorp Investment's commitment to innovation and ongoing investment in interactive client experiences.

"We are developing experiences that allow clients and their advisors to connect online, person to person and on the phone so that they can engage us on their terms," Jordahl said. "Planning and investing for the future doesn't have to be intimidating. Our intuitive, easy-to-use digital advice offerings help make the experience simpler and more efficient for our clients by enabling them to track progress against their goals anytime, anywhere."

To learn more about Automated Investor, call 866.758.8655.

### **About Wealth Management from U.S. Bancorp Investments**

U.S. Bancorp Investments provides a broad range of services to clients including retail brokerage, investment advisory services, financial planning and insurance through its representatives in 25 states and online. We believe in doing the right thing for our clients to help them at every life stage work toward their financial goals.

U.S. Wealth Management – U.S. Bancorp Investments is the marketing logo for U.S. Bancorp Investments.

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