U.S. Bancorp Advisors Launches Suite of Offerings for Investors New to Building Wealth

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Tools include new team-based advisory service, enhanced self-directed brokerage platform, and integrated app

MINNEAPOLIS--(BUSINESS WIRE)-- U.S. Bancorp Advisors (USBA), a registered investment advisor and affiliate of U.S. Bank, today announced the launch of a suite of offerings designed for individuals who are new to investing or beginning to build wealth. The capabilities include a new team-based investment advisory service for investors with at least $25,000, an enhanced self-directed brokerage service with no minimum investment, and a next-generation investing platform that integrates banking (offered through U.S. Bank) and investing (offered through USBA) across the bank's online ecosystem.

The offerings give investors who are building a financial foundation more ways to pursue their goals — combining the convenience and flexibility of online management with the strength of USBA's financial expertise.

"We want to help all of our customers to reach their financial goals – beginning investors, but also investors well into their wealth-building years and investors who are closer to retirement – by providing a variety of compelling options tailored toward how they like to invest," said Scott Ford, President of Wealth Management at U.S. Bank. "With this suite of capabilities, we're meeting people where they are — independently, with an advisor, or a blend of both. By combining transparent, low-cost tools with our research and expertise, we're helping customers link their investments to life goals and take informed steps at every stage."

To oversee the launch of these services, U.S. Bancorp announced that Ryan K. Nelson is the new President of Emerging Affluent Wealth Management. In this newly created role, Nelson will spearhead the strategy for beginning investors for Wealth Management and will lead teams focused on bringing integrated offerings and digital experiences to beginning investors, with a goal of providing investing tools for anyone who may need them.

Nelson has 30 years of financial services experience, and most recently served as U.S. Bank's East Regional Executive for Private Wealth Management. Prior to working at U.S. Bank, Nelson worked with Zions Bank, where he was region president; and also held roles at JPMorgan Chase, Wells Fargo, and Fidelity.

"I'm excited to lead this work and expand access to expert guidance and modern tools for investors," Nelson said. "We're making investing easier to start and simpler to sustain. Whether you want guidance from a team of advisors, prefer to invest on your own, or a blend of both, we now bring it together in one connected experience so you can build toward your goals with confidence."

Wealth Connect

The new team-based, fee-based advisory service, called Wealth Connect, pairs investors with a team of licensed financial advisors via phone or video conference. Investors with $25,000 can open a Wealth Connect account by meeting with a team of advisors to understand their goals and make customized recommendations for a diversified portfolio. Investors can also access ongoing advice, make adjustments to their investments as their needs change and meet with advisors for annual portfolio reviews.

Self-Directed Investing

USBA's enhanced self-directed brokerage service builds on the existing capability to deliver a more convenient, intuitive and integrated platform. Investors can trade stocks, mutual funds and ETFs online with no annual fees or commissions via usbank.com or the U.S. Bank mobile app. Margin and options trading are also available for a fee for qualified investors. No minimum investment is required to open an account.

Next Generation Investing platform

The Next Generation Investing platform brings together the best of banking and investing in one app and is designed to make investing accessible and approachable for investors who are just beginning the wealth-building journey. It allows users to manage their cash and investments seamlessly, see progress against their short- and long-term goals, and seamlessly track spending, saving, borrowing and investments.

About U.S. Bank Wealth Management

U.S. Bank Wealth Management offers comprehensive wealth management services, including wealth planning, investment management, trust and estate services and wealth management banking through U.S. Bank, and financial planning, investment, insurance and brokerage services through its affiliate USBA.

USBA offers retail brokerage, investment advisory and insurance services. USBA became part of U.S. Bancorp in December 2022, when U.S. Bancorp completed its acquisition of MUFG Union Bank.

About U.S. Bancorp

U.S. Bancorp, with approximately 70,000 employees and $692 billion in assets as of Dec. 31, 2025, is the parent company of U.S. Bank National Association. Headquartered in Minneapolis, the company serves millions of customers locally, nationally and globally through a diversified mix of businesses including consumer banking, business banking, commercial banking, institutional banking, payments and wealth management. U.S. Bancorp has been recognized for its approach to digital innovation, community partnerships and customer service, including being named one of Fortune's most admired superregional banks. Learn more at usbank.com/about.

Disclosures

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