



U.S. Bank Ranks #1 in Investor Satisfaction with Full-Service Wealth Management Firms in 2024 J.D. Power Study

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*Bank takes top honors in five dimensions, including #1 in trust*

MINNEAPOLIS--(BUSINESS WIRE)-- U.S. Bank is No. 1 in overall customer satisfaction for Wealth Management in the J.D. Power 2024 U.S. Full-Service Investor Satisfaction Study, the bank shared today.

The survey of 9,951 investors rates customer satisfaction among those who work directly with a dedicated financial advisor or team of advisors.

U.S. Bank was ranked No. 1 in five dimensions of the study, including level of trust; digital channels (web, mobile); product and service offerings; allowing clients to manage their wealth how and when they want; and resolving problems or complaints.

"Our client relationships are very important to us, and we are keenly focused on listening to and responding to our clients' needs," said Gunjan Kedia, Vice Chair, Wealth, Corporate, Commercial and Institutional Banking at U.S. Bank. "We've introduced new product capabilities without losing the human touch, and we're proud to offer clients a broad array of integrated solutions. We have a talented and passionate team of advisors who are there for our clients at every stage of their wealth journeys. We're grateful to receive such a prestigious award."

#### **About the study**

The U.S. Full-Service Investor Satisfaction Study, now in its 22nd year, measures overall investor satisfaction with 25 full-service investment firms in seven dimensions (in order of importance): trust; people; products and services; value for fees; ability to manage wealth how and when I want; problem resolution; and digital channels.

The 2024 study is based on responses from 9,951 investors who work directly with a dedicated financial advisor or team of advisors. Those surveyed who were U.S. Bank clients worked with advisors from U.S. Bank or its affiliate U.S. Bancorp Investments (USBI). The study was fielded from January 2023 through January 2024.

#### **About U.S. Bank**

U.S. Bancorp, with more than 70,000 employees and \$663 billion in assets as of December 31, 2023, 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 the 2023 World's Most Ethical Companies and Fortune's most admired superregional bank. To learn more, please visit the U.S. Bancorp website at [usbank.com](https://usbank.com) and click on "About Us."

#### **Disclosures**

**Investment and insurance products and services including annuities are:**

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Deposit products offered by U.S. Bank National Association. Member FDIC. Credit products offered by U.S. Bank National Association and subject to normal credit approval.

U.S. Bank is not responsible for and does not guarantee the products, services or performance of U.S. Bancorp Investments.

U.S. Bank does not offer insurance products. Insurance products are available through our affiliate U.S. Bancorp Investments.

#### **For U.S. Bancorp Investments:**

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Insurance products are available through various affiliated non-bank insurance agencies, which are U.S. Bancorp subsidiaries. CA Insurance License #0E24641. Products may not be available in all states.

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