

Lisa Kopis

Private Wealth Advisor

lisa.kopis@usbank.com | D: 314-505-8013 | C: 618-978-6215



CREDENTIALS

Certified Divorce Financial Analyst® CDFA®

MBA, University of Illinois at Urbana-Champaign, Champaign, Illinois

B.A., University of Illinois, Springfield, Illinois

NMLS# 2298048

As a Private Wealth Advisor, Lisa is responsible for providing comprehensive wealth management strategies tailored to her clients' specific needs. These strategies encompass Investment Management, Private Banking, Trust and Estate Services, and Wealth Planning. Lisa takes the time to understand her clients' unique needs, and she directs teams of specialists — often working closely with other client advisors, such as attorneys and accountants — to provide services that help clients work toward their goals.

Lisa began working in the financial services industry in 1985. Prior to joining U.S. Bank Private Wealth Management, she served as a financial planning specialist at Stifel Financial Corporation.

Over the years, her career and knowledge grew as she worked with national and regional financial institutions in Illinois and Missouri, earning promotions and increasing her skill. Lisa especially enjoyed developing her financial planning abilities across all the disciplines of wealth management and she has always worked in roles that serve private wealth individuals, families, business owners and non-profit organizations. In addition to her roles in the financial field, she has worked as an adjunct professor to instruct students in Entrepreneurship.

Lisa is active in her community serving and volunteering for local boards in her hometown of Belleville. She is an active member of the Professional Women's Association. She is also dedicating her down time to completing her CERTIFIED FINANCIAL PLANNER® designation to better serve clients in her role.

When not working, Lisa enjoys spending time with friends, family and husband, Jeff and sons Austin and Levi. She spends much of her free time with this group engaging in outdoor activities that include biking and kayaking.

usbank.com/privatewealth

Investment products and services are:

NOT A DEPOSIT • NOT FDIC INSURED • MAY LOSE VALUE •

NOT BANK GUARANTEED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY

U.S. Bank and its representatives do not provide tax or legal advice. Your tax and financial situation is unique. You should consult your tax and/or legal advisor for advice and information concerning your particular situation. U.S. Bank is not affiliated with any organizations mentioned.



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.

©2022 U.S. Bank 591802 (8/21)