



# Firm Overview

Intelligent Personalization® – Customized High-Net-Worth Investment Management Solutions

For over 35 years, City National Rochdale has specialized exclusively in providing Intelligently Personalized® portfolio management for high-net-worth individuals, families, and institutions.

## OFFICE LOCATIONS

- New York, NY
- Beverly Hills, CA
- Irvine, CA
- La Jolla, CA
- San Francisco, CA
- Lake Mary, FL
- Chicago, IL
- Houston, TX

## NATIONAL COVERAGE

- 30+ Portfolio Managers
- 18 Investment Consultants

## INVESTMENT STRATEGIES

- Equities
- Core Fixed Income
- Opportunistic Income
- Real Assets
- Alternative Investments<sup>1</sup>

## KEY PRINCIPLES AND CLIENT BENEFITS

We can help:



- Achievement of Financial Goals
- Active Risk Management
- Tax Management
- Private Portfolio Manager
- Research-Driven Portfolio Design

## CITY NATIONAL ROCHDALE AT A GLANCE



investment consultants and portfolio managers hold the Chartered Financial Analyst® designation<sup>2</sup>



assets under management as of July 31, 2025



average professional experience of investment strategy committee members



historical client retention rate<sup>3</sup>

<sup>1</sup> Alternative investments are speculative, entail substantial risks, offer limited or no liquidity, and are not suitable for all investors.  
<sup>2</sup> As of January 31, 2025, CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.  
<sup>3</sup> 2019 through January 31, 2025

# Our Process

Our personalized approach to investment management is designed for clients seeking portfolio strategies that address their unique investment needs, risk tolerances, market environment, and investment opportunities.

## UNDERSTAND GOALS

City National Rochdale builds portfolios around the client’s goals in order to develop an insightful “personal benchmark” that is unique to each individual.

## PERSONAL BENCHMARK

A customized blueprint for each client’s portfolio, supported by in-depth research and guided by a unique investment policy statement.

## PORTFOLIO MANAGEMENT

Our highly educated and experienced portfolio managers customize each portfolio to the exact needs of every client.

## INVESTMENT CAPABILITIES



### Equities

- Domestic Equities
- International and Emerging Markets



### Core Fixed Income

- Taxable
- Tax-Exempt
- Liquidity Management



### Opportunistic Income

- High-Yield
- Inflation risk mitigation
- Hedged (for qualified investors)
- Structured Credit (for qualified investors)



### Alternative Investments and Real Assets<sup>1</sup>

- Non-correlated, non-traditional strategies

## Important Information

The views expressed represent the opinions of City National Rochdale, LLC (CNR) which are subject to change and are not intended as a forecast or guarantee of future results. Stated information is provided for informational purposes only, and should not be perceived as personalized investment, financial, legal or tax advice or a recommendation for any security. It is derived from proprietary and non-proprietary sources which have not been independently verified for accuracy or completeness. While CNR believes the information to be accurate and reliable, we do not claim or have responsibility for its completeness, accuracy, or reliability.

All investing is subject to risk, including the possible loss of the money you invest. As with any investment strategy, there is no guarantee that investment objectives will be met and investors may lose money. Diversification does not ensure a profit or protect against a loss in a declining market. Past performance is no guarantee of future performance.

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