CITY NATIONAL ROCHDALE®
AN RBC/CITY NATIONAL COMPANY

Firm Overview

INTELLIGENTLY PERSONALIZED HIGH-NET-WORTH INVESTMENT MANAGEMENT SOLUTIONS

For over 30 years, City National Rochdale has specialized exclusively in providing intelligently personalized portfolio management for high-net-worth individuals, families, and institutions.

CITY NATIONAL ROCHDALE AT A GLANCE

$55.6+B* assets under management *As of Jul. 31, 2021	**30+ years** average professional experience of asset allocation committee members
80+% investment consultants and portfolio managers who are CFA charterholders	**90+%** historical client retention rate

KEY PRINCIPLES AND CLIENT BENEFITS

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

OFFICE LOCATIONS

New York, NY
Beverly Hills, CA
Irvine, CA
La Jolla, CA[1]
San Francisco, CA
Lake Mary, FL
Chicago, IL
Houston, TX

NATIONAL COVERAGE

33 Portfolio Managers
18 Investment Consultants

INVESTMENT STRATEGIES

Equities
Core Fixed Income
Opportunistic Income
Real Assets
Alternative Investments†

[1]Investment advisory office location.
†Alternative investments are speculative, entail substantial risks, offer limited or no liquidity, and are not suitable for all investors.

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.

Client Conversation

City National Rochdale actively listens to the client's investment objectives 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.

SPECIALIZED & CORE STRATEGIES

Equities

- Domestic Equities
- International and Emerging Markets
- Equity Income Strategies

Core Fixed Income

- Taxable Strategies
- Tax-Exempt Strategies
- Liquidity Management

Opportunistic Income

- High-Yield Strategies
- Inflation Protection Strategies
- Hedged Strategies (for qualified investors)
- Structured Credit (for qualified investors)

Alternative Investments and Real Assets†

- Non-correlated, non-traditional strategies

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TO LEARN MORE, VISIT CNR.COM OR FOLLOW US ON OUR SOCIAL MEDIA

Important Disclosures

The information presented does not involve the rendering of personalized investment, financial, legal, or tax advice. This presentation is not an offer to buy or sell, or a solicitation of any offer to buy or sell any of the securities mentioned herein.

As with any investment strategy, there is no guarantee that investment objectives will be met, and investors may lose money.