

# Comprehensive Wealth Assessment (CWA) Service

## OVERVIEW

City National Rochdale's (CNR) Comprehensive Wealth Assessment is a complimentary, holistic service offered in collaboration with financial advisors to identify gaps and solutions and empower clients to make informed decisions that will serve to optimize their wealth. Our comprehensive approach to assessing wealth encompasses what we refer to as the Strategic Pillars of Wealth. These pillars enable CNR and financial advisors to expand wealth analysis and recommendations into areas that are often ignored or forgotten.

### ANALYZING ALL ASPECTS OF A CLIENT'S FINANCIAL WELL-BEING ACROSS THE STRATEGIC PILLARS OF WEALTH

#### INVESTMENT PLANNING

Customize Your Investment Approach

**ESTATE & LEGACY PLANNING**  
 Protect Your Wealth and Your Legacy

**ASSET PROTECTION & RISK MANAGEMENT**  
 Reduce Risk and Safeguard Your Wealth

**PHILANTHROPY**  
 Make an Impact

**INCOME TAX CONSIDERATIONS**  
 Understand Your Tax Exposure



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