CITY NATIONAL ROCHDALE
AN RBC/CITY NATIONAL COMPANY

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

Important Disclosures