CITY NATIONAL ROCHDALE
AN RBC/CITY NATIONAL COMPANY

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 with $1m or more in investable assets.

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[1]

KEY PRINCIPLES AND CLIENT BENEFITS

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

CITY NATIONAL ROCHDALE AT A GLANCE

80% investment consultants and portfolio managers hold the Chartered Financial Analyst® designation[2]

$54.2 BILLION assets under management as of October 31, 2022

35+ YEARS average professional experience of investment strategy committee members

90%+ historical client retention rate

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[1]

- Non-correlated, non-traditional strategies

To learn more, visit **cnr.com** or follow us on social media

Footnotes & Important Disclosures

[1] Alternative investments are speculative, entail substantial risks, offer limited or no liquidity, and are not suitable for all investors.
[2] Chartered Financial Analyst® is a registered trademark owned by CFA Institute.