

International Custody & Asset Protection Solutions

STRATEGY OVERVIEW

City National Rochdale has the capability to assist in establishing and managing investment accounts for high net worth families and individuals seeking asset protection strategies and/or international diversification.

Today, there are compelling investment, market, geopolitical, and cultural themes driving the growing demand by affluent individuals, families and their advisors for risk management, asset protection and diversification strategies. At the same time, developing and executing a comprehensive strategy can often be challenging and unfamiliar for most.

City National Rochdale works with third party trustees, protectors, and custodians domiciled outside of the U.S. in jurisdictions that favor the protection of trust assets. This allows beneficial owners to employ the investment advisory services of a U.S. registered domestic asset manager without compromising the protection of the trust assets.

CITY NATIONAL ROCHDALE PROVIDES:

- > Prudent risk management through global investment asset class, currency, geographic and jurisdictional diversification planning and investing
- > A disciplined investment advisor that works with clients to develop the optimal mix of asset classes and investment styles, to maximize returns while minimizing risk on a tax efficient basis relative to their unique risk tolerance, experiences, income needs and investment time horizons
- > The specialized services and global resources of City National Rochdale at a transparent and competitive price
- > Completely independent and essential service providers (Investment Advisor, Trustee, Protector and Custodian) offering a check and balance for their respective professional disciplines
- > Online account access and comprehensive portfolio and tax reporting

Jurisdictional Diversification

An explosion in civil litigation is unique to the U.S. and is creating growing unmanageable domestic risks to affluent families and individuals.

Geographic Diversification

Geopolitical volatility, terrorism and potential vulnerabilities to the U.S. Homeland present institutional and systemic risks that historically have not required sophisticated planning.

Global Investment Class Diversification

Gaining complete access to the global investment marketplace best provides for all the necessary tools to optimally protect, preserve, and build wealth for current and future generations.

Currency Diversification

Prudent use of currency diversification strategies outside the U.S. dollar may reduce risk and lower portfolio volatility, while improving overall portfolio returns.

City National Rochdale®

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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.

Certain statements contained herein may constitute projections, forecasts and other forward looking statements, which do not reflect actual results and are based primarily upon a hypothetical set of assumptions applied to certain historical financial information. Certain information has been provided by third-party sources and, although believed to be reliable, it has not been independently verified and its accuracy or completeness cannot be guaranteed.

Any opinions, projections, forecasts, and forward-looking statements presented herein are valid as on the date of this document and are subject to change.

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

City National Bank has no affiliations with any of the third party custodians who provide international custody services.

This material is available to advisory and sub-advised clients of City National Rochdale, LLC, a Registered Investment Advisor and a wholly-owned subsidiary of City National Bank.

Non-deposit Investment Products: ■ are not FDIC insured ■ are not Bank guaranteed ■ may lose value

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