CHEVY CHASE TRUST
INVESTMENT ADVISORS

Family Wealth Services

Multi-Generational Investment Management & Fiduciary Capabilities

Chevy Chase Trust Family Wealth Services offers multi-generational wealth advice designed to achieve uncommon results. Our services extend beyond investment management into every facet of financial life for individuals and families with significant wealth and complex situations.

What We Do

Utilizing the depth and experience of our firm, we help our clients navigate through a broad array of challenging financial issues. Our work begins with understanding the unique circumstances of every client and considering all of the possibilities. With a careful and thoughtful approach, we collaborate with your existing advisors and other outside experts to ensure a well coordinated and personalized plan. From financial and estate planning to investment management, we are dedicated to performing as your family office and delivering comprehensive, sophisticated wealth services today and for generations to come.

Our Services

Our staff of more than 80 professionals averages 20 years of experience managing the financial affairs of individuals and families. Each client has a dedicated core team who work together to provide world class service and attention to detail. This includes managing disparate assets, focusing on planning as a guide to better decisions, facilitating communication among clients and their heirs, promoting awareness and understanding across generations, consulting with individual advisors and calling on trusted partners with specific expertise.

CCT Investment Management & Advisor Oversight

- Global, Multi-Cap Equity
- Taxable & Tax-Exempt Fixed Income
- Investment Manager Search, Selection & Oversight
- 3rd Party Specialty Managers
- Alternative Investments
- Options & Derivative Strategies

CCT Family Wealth Services

- Financial & Estate Planning
- Fiduciary Services
- Custodial Services
- Accounting & Tax Planning
- Bill Paying
- Philanthropic Advice
- Family Meetings
- Legacy Consulting
- Aggregated Reporting

Trusted Partners

- Risk Management
- Insurance
- Real Estate Advice and Property Administration
- Facilitation of Banking Services

7501 WISCONSIN AVENUE, SUITE 1500W, BETHESDA, MD 20814 TEL 240.497.5000 FAX 240.497.5011 www ChevyChaseTrust.com

Family Wealth Services provides a comprehensive advisory relationship:

Investment Management and Advisor Oversight

- Customized Global Multi-Cap Portfolios
- Taxable and Tax-Exempt Fixed Income
- Investment Manager Search, Selection & Oversight
- 3rd Party Specialty Managers
- Hedge Funds
- Derivative and Options Strategies

Financial and Estate Planning

- Balance Sheet Preparation
- Cash Flow Analysis
- Retirement Planning
- Educational Planning
- Monte Carlo Simulation and Stress Testing
- Restricted Stock and Option Oversight and Analysis
- Corporate Executive Services
- Estate Plan Document Review and Advice
- Estate Plan Flow Charting
- Gifting Strategies
- Generation Skipping Transfer Advice

Fiduciary Services

- Trust Management
- Estate Administration
- Custodial Services & Safekeeping
- Account Reporting
- Online Access and Download

Tax and Accounting Services

- Fiduciary Return Preparation
- Tax Advice and Management
- Bill Paying

Risk Management

- Equity Hedging
- Debt & Interest Rate Protection

Insurance

- Advice & Oversight
- Life
- Health
- Property & Casualty
- Excess Liability (Umbrella)

Real Estate Advice

- Transactional Advice
- Financing
- Appraisals
- Property Management

Banking Introductions/Facilitation

- Mortgages
- Lines-of-credit
- Commercial and Small Business Lending
- Portfolio Collateral

Philanthropic Advisory

- Legacy Planning
- Foundation & Endowment Creation and Management
- Charitable Gifting

Legacy Consulting

- Family Meetings
- Generational Transitions
- Family Businesses
- Next Generation Education