



## Company Profile

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Since 1999, Chevy Chase Trust has provided individuals, families and foundations with an alternative to institutionalized money management. An independent, privately-owned and financially secure firm, Chevy Chase Trust pursues—without conflict—the greatest potential in each client's wealth. Our advisors build and manage diversified portfolios that are personal and effective.

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### Investment Management Services

Everything we do informs and supports each client's individual investment strategy.

- GLOBAL THEMATIC EQUITY PORTFOLIOS
- DIVERSIFIED FIXED INCOME PORTFOLIOS
- INDIVIDUAL STOCKS AND BONDS
- CUSTOMIZED ASSET ALLOCATION
- DIRECT RELATIONSHIP WITH PORTFOLIO MANAGER(S)
- NO OUTSIDE MANAGERS OR FUNDS

Our comprehensive expertise includes:

- **FINANCIAL AND ESTATE PLANNING**
  - Cash flow analysis
  - Retirement planning
  - Executive compensation planning
  - Insurance needs analysis
  - Stock diversification strategies
  - Estate planning analysis
  - Charitable giving planning
- **FIDUCIARY AND TRUST SERVICES**
  - Impartial professional Trustee or Executor
  - Trust and Estate administration as fiduciary or agent for a fiduciary
- **FAMILY WEALTH SERVICES**
  - Multi-family office and concierge services
  - Cooperative partnerships with outside financial and professional advisors

### Different for the sake of being better

The real value of Chevy Chase Trust comes in sitting down with an advisor and discussing your situation. That's when you'll understand the difference Chevy Chase Trust can make in your finances — and your future.

For a consultation, please contact  
Stacy Murchison: 240.497.5000 or  
visit [ChevyChaseTrust.com](http://ChevyChaseTrust.com).

#### AT-A-GLANCE

- Headquartered in the Washington, D.C. metro area
- Over \$36 billion in assets under management
- Multi-generational private ownership
- More than 100 professionals with years of experience
- More than 97% client retention