



Company Profile

March 2023

Since 1999, Chevy Chase Trust has provided individuals, families, and select institutions with an alternative to institutionalized money management. An independent, privately-owned and financially secure firm, Chevy Chase Trust pursues the greatest potential in each client's wealth by applying all of our knowledge, experience and creativity to one client portfolio at a time. Our advisors build and manage diversified portfolios that are personal and effective.

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

Our complimentary expertise include:

- **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
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or visit ChevyChaseTrust.com.

AT-A-GLANCE

- Headquartered in the Washington, D.C. metro area
- Approximately \$33 Billion in assets under management as of March 31, 2023
- More than 115 professionals with an average of 17 years of experience as of March 31, 2023
- Client retention rate in 2022 is 98%⁽¹⁾

(1) Based on Investment Management Fees on a trailing 12-month basis.