

Firm Overview

Intelligent Personalization[®] – Customized High-Net-Worth Investment Solutions with portfolio management for individuals, families, and institutions.

\$73.6
BILLION

assets under
management
as of
January 31, 2026



90%+

historical client
retention rate¹



75%

investment consultants &
portfolio managers hold
CFA[®] designations²



25+ YEARS

average professional
experience of investment
strategy committee members



40+ YEARS

supporting high-net-worth
clients and institutions



30+

portfolio managers
across the U.S.



18

investment consultants
across the U.S.

OFFICE LOCATIONS

New York, NY • Beverly Hills, CA • Irvine, CA • La Jolla, CA • San Francisco, CA • Lake Mary, FL • Chicago, IL • Houston, TX

1. 2010 through January 31, 2026.

2. As of January 31, 2026. CFA[®] and Chartered Financial Analyst[®] are registered trademarks owned by CFA Institute.

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.

Understand Goals

We build portfolios around the client's goals 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.

Investment Capabilities



Equities

- Domestic Equities
- International and Emerging Markets



Core Fixed Income

- Taxable
- Tax-Exempt
- Liquidity Management



Opportunistic Income

- High-Yield
- Inflation risk mitigation
- Hedged (for qualified investors)
- Structured Credit (for qualified investors)



Alternative Investments* and Real Assets

- Non-correlated
- Non-traditional

*Alternative investments are speculative, entail substantial risks, offer limited or no liquidity, and are not suitable for all investors.

To learn more, visit rbcrochdale.com or follow us on 

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