

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 

IMPORTANT INFORMATION

This document is for general information and education only. It is not meant to provide specific tax guidance. The information in this document was compiled by the staff of RBC Rochdale, LLC (RBC Rochdale) from data and sources believed to be reliable, but RBC Rochdale makes no representation as to the accuracy or completeness of the information. The opinions expressed, together with any estimates or projections given, constitute the judgment of the author as of the date of the presentation. RBC Rochdale has no obligation to update, modify, or amend this document or otherwise notify you in the event any information stated, opinion expressed, matter discussed, estimate, or projection changes or is determined to be inaccurate.

RBC Rochdale, as a matter of policy, do not give tax, accounting, regulatory, or legal advice. Rules in the areas of law, tax, and accounting are subject to change and open to varying interpretations. Any strategies discussed in this document were not intended to be used, and cannot be used for the purpose of avoiding any tax penalties that may be imposed. You should consult with your other advisors on the tax, accounting and legal implications of actions you may take based on any strategies or information presented taking into account your own particular circumstances.

This presentation (or any portion thereof) may not be reproduced, distributed, or further published by any person without the written consent of RBC Rochdale.

RBC Rochdale, LLC is an SEC-registered investment adviser and wholly-owned subsidiary of City National Bank. Registration as an investment adviser does not imply any level of skill or expertise. City National Bank is a subsidiary of Royal Bank of Canada.