RBC Rochdale

Firm Overview

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

$75.9 BILLION

assets under management as of July 31, 2026

90%+
historical client retention rate[1]

75%
investment consultants & portfolio managers hold CFA® designations[2]

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.

Non-Deposit Investment Products: • Are Not FDIC Insured • Are Not Bank Guaranteed • May Lose Value

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 in

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