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**PRIVATE WEALTH**[MANAGEMENT \(https://private-wealth.us.cibc.com/web/guest\)](https://private-wealth.us.cibc.com/web/guest)

**About Us**

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# Resources for You



FEATURED PUBLICATION

### ***The Advisor***

Read the latest edition of our magazine, which covers current trends in wealth planning, investment management, banking and more. Our feature story is titled *Populism Rising: The Rising Tide of Populist Movements and Its Impact on Investors*

**READ MORE (THEADVISOR)**



LATEST INVESTMENTS BLOG

## **ESG Is More Than Just Three Letters**

More investors than ever are sidestepping out-of-date stereotypes and myths about sustainable and responsible investing, and are now ready to act.

**[READ MORE \(/BLOG/-BLOGS/ESG-IS-MORE-THAN-JUST-3-LETTERS\)](#)**



FEATURED BLOG

### 3 Strategies for Minimizing Estate Taxes

Answering some basic questions about how you want your future wealth plan to look can help facilitate your estate planning process.

LEARN MORE (</BLOG/3-STRATEGIES-FOR-MINIMIZING-ESTATE-TAXES>)

# Understanding What's Important to You

Personalized, holistic wealth plans to fit your distinct goals. Where should we start?



(</inv/investment-approach>)  
Investments

(</inv/investment-approach>)



(</retirement-planning>)  
Retirement

(</retirement-planning>)



(</estate-planning>)  
Wealth Transfer

(</estate-planning>)



(</trustee-services>)  
Trustee Services

(</trustee-services>)



(</private-banking>)  
Banking

(</private-banking>)



(</privately-held-business>)  
Business

(</privately-held-business>)



(</family-legacy>)  
Family Legacy

(</family-legacy>)



(</effective-philanthropy>)  
Philanthropy

(</effective-philanthropy>)

# Our Distinguishing Factors

Three key strengths, in combination, distinguish our offering to private clients



**Proven, Multi-Asset Class Investment Platform**  
(/inv/investment-approach)



**Cohesive Wealth Planning and Trustee Services**  
(/ws/approach) and Trustee Services (/trustee)



**Tailored Private Banking Solutions**  
(/private-banking)

## Start the Relationship

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Insights (<https://private-wealth.us.cibc.com/web/guest/resource-center>)

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