



**About Us**

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# Strength, Stability and Resources for Innovation

As a client of CIBC Private Wealth Management, you benefit from our boutique, high-quality experience backed by the financial strength and stability of our global parent company, CIBC. Our unique platform has been expertly crafted by professionals with extensive experience managing wealth for affluent clients. CIBC brings a 150-year history and was recognized in 2016 as one of the top 10 safest banks in North America by Global Finance magazine.

From offices across the U.S., we deliver a robust complement of investment management, wealth strategies and legacy planning, and private banking, deposit and lending services.\* Importantly, we commit to act in our clients' best interests, with a goal of providing the highest-quality client experience in the industry.

Leveraging CIBC's resources for innovation, we continue to build upon our legacy of excellence, further expanding our offering and enhancing our platform.

*\*Private banking solutions are provided by CIBC Bank USA.*

# Understanding What's Important to You

Our relationship with clients is based on a simple philosophy—

Ask the right questions, listen carefully to your answers.

Before we can envision what wealth management will mean for you and your family,

we need to learn what is most important to you and your family.

As part of our discovery process, together we will explore some of the issues of holistic wealth management, including:

INVESTMENT & RETIREMENT  
INCOME  
WEALTH TRANSFERS  
TRUSTEE SERVICES  
BANKING  
FAMILY LEGACY  
PHILANTHROPY  
BUSINESS SUCCESSION

RISK  
&  
PROTECTION

## Our Distinguishing Factors



### Proven, Multi-Asset Class Investment Platform

- Proprietary investment strategies comprised of individual stocks and bonds
- Select external managers create a fully diversified platform
- Unique access to alternative investments
- GIPS-compliant track record of strong, risk-adjusted returns



### Cohesive Wealth Planning and Trustee Services

- Comprehensive financial and legacy planning capabilities
- Organized and simplified analysis of financial and estate plan
- Wealth transfer and entity management guidance
- Full trust services offering



### Tailored Banking Solutions

- Leading commercial bank for business needs
- Custom lending options to provide liquidity when needed
- Residential real estate financing
- Deposit accounts with attractive interest rates and online access

Find an Advisor

Atlanta: 3290 Northside Parkway, 7th Floor Atlanta, GA 30327 ([Atlanta](#))

## Resources for You

### NEWS

#### CNBC *Power Lunch*

Dave Donabedian joins 'Power Lunch' to discuss markets amid trade and Fed rate hike concerns.

#### WATCH (4:20)

([HTTPS://WWW.CNBC.COM/VIDEO/2018/11/02/CANT-MAKE-THE-CASE-FOR-A-RECESSION-OR-BULL-MARKET-SAYS-HUGH-JOHNSON.HTML](https://www.cnbc.com/video/2018/11/02/cant-make-the-case-for-a-recession-or-bull-market-says-hugh-johnson.html))

CIBC placed 8 of 10 banks ranked in Global Finance magazine's "Safest Banks in North America" list, published September 29, 2016. Banks were selected through an evaluation of long-term foreign currency ratings—from Moody's, Standard & Poor's and Fitch IBCA—and CIBC is one of the 500 largest banks in the world.

JOHNSON.HTML)

### THE ADVISOR

#### Q1 2019: Seven Important Questions About the Economy and Markets

Here are the best video answers to our clients' minds about 2019--and our experts' best answers.

READ MORE (/ADVISOR-Q1-2019)

### WEALTH YOUR WAY PODCAST SERIES

#### Charitable Planning

When fortune smiles on you, how do you smile back? Donating cash may be one of the easiest ways to support your favorite causes, but there are many other strategies you can use as well.

#### READ MORE

([HTTPS://PRIVATE-WEALTH.US.CIBC.COM/BLOG/-/BLOGS/CHARITABLE-PLANNING-WHEN-FORTUNE-SMILES-ON-YOU-HOW-DO-YOU-SMILE-BACK](https://private-wealth.us/cibc.com/blog/-/blogs/charitable-planning-when-fortune-smiles-on-you-how-do-you-smile-back))

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