

We treat your portfolio like it's, well...your own.

OUR CLIENTS' PORTFOLIOS HAVE ONLY ONE THING IN COMMON, EACH IS CUSTOM TAILORED TO THEIR NEEDS, NOT OURS. The industry trend to select from a short list of model portfolios is indeed profitable—for investment firms. Our clients however, realize that highly tailored portfolios deliver the kind of desirable results their families deserve. It's not the common approach, but it's another reason our uncommonly loyal clients depend on us to preserve, manage and grow their legacies.

There is a tangible difference that the oldest and largest multi-family office headquartered in the West can mean to your legacy. Experience it. Talk to Tim McCarthy at 800.971.3095.

Southern California | Northern California | Nevada | Northwest | WhittierTrust.com



Investable assets minimum of \$10 million.

Cherish your family. Appreciate your assets.

WHAT DO YOU WANT TO LEAVE YOUR FAMILY? PERHAPS A LEGACY? Our highly individualized approach allows us to reflect our clients' true goals and aspirations. 85 years have taught us that enduring relationships enhance not only wealth, but the individuals we are privileged to call clients. There is a tangible difference that the oldest and largest multi-family office headquartered in the West can mean to your legacy. Experience it. Talk to Tim McCarthy at 800.971.3095.

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WhittierTrust
INVESTMENT & WEALTH MANAGEMENT

Investable assets minimum of \$10 million.

Art. Appreciation. Seems we have quite a lot in common.

FROM PLEIN AIR TO PRE-TAX PROFITS, WE UNDERSTAND WHAT MOVES OUR CLIENTS. At Whittier Trust our approach reflects what's important to each individual client. An expertise we've honed over 85 years, through deep, lasting relationships that enhance every facet of family wealth. There is a tangible difference that the oldest and largest multi-family office headquartered in the West can mean to your legacy. Experience it. Contact Tim McCarthy at 800.971.3660.

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Investable assets minimum of \$10 million.

Prosperity for posterity.

CREATING A LEGACY TAKES A LIFETIME. MAINTAINING IT OVER GENERATIONS TAKES OUR KIND OF EXPERTISE. After 85 years, we know that perpetuating wealth can be as much about family dynamics as it is solid economics. It's also the reason we pay attention to every individual as closely as we focus on their assets. We believe in cultivating appreciation *and* gratitude that endures.

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Number one on your family's well-to-do list.

A WEALTH MANAGEMENT SOLUTION THAT PUTS YOUR PRIORITIES FIRST SHOULD BE AT THE TOP OF YOUR LIST. What begins as a client's desire for asset growth often reveals only a fraction of their story. As an independent firm, we delve deeper to discover our clients' true goals and passions. The insights we gain go beyond purely managing assets—they enable us to build legacies that endure.

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Our strategy? Drill deep.

OUR KNOWLEDGE OF THE OIL & GAS BUSINESS IS COMPREHENSIVE. OUR UNDERSTANDING OF CLIENTS IS JUST AS PROFOUND. As a firm founded on oil, we offer the technical and financial expertise necessary to address the particular challenges these assets can present. Add our skill at uncovering the critical insights needed to maximize every portfolio and you have a combination tailored to achieve powerful results.

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