



**FOR IMMEDIATE RELEASE**  
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**WHITTIER TRUST NAMES NEW CEO  
UPON COMPLETING EXECUTIVE SUCCESSION**

**David Dahl named CEO as Mike Casey transitions to Executive Chairman of the firm.**

**South Pasadena, CA** — Whittier Trust Investment and Wealth Management is pleased to announce that David A. Dahl has been named CEO. Michael J. Casey will remain with the firm in the new position of Executive Chairman, where he will provide strategic leadership and guidance within the firm. Mr. Casey has made an indelible mark on Whittier Trust since he joined the firm in 1990. Since that time, Mike has helped transition what was then a single-family office for over 60 years, to a highly respected Investment and Wealth Management firm. Today the firm offers 350 affluent families a wide and deep array of services within a multi-client setting. “It has been both a pleasure and an honor to serve the families who I call clients and friends. I look forward to helping continue the development of family governance strategies that provide the successful intergenerational transition of wealth,” said Executive Chairman, Mike Casey.

In the 23 years since David began his career with Whittier, he has worked closely with Mike in a variety of leadership positions—most recently as President, after serving as COO for four years. “Mike has provided a robust base off which we’ll continue to build the oldest and largest multi-client family office in the West. I feel privileged to lead a uniquely dedicated, and experienced team of professionals—professionals who are committed to providing unparalleled service and value to our clients year after year,” said Mr. Dahl.

Continuity, as reflected in the very long tenure of Whittier’s professionals, is embedded in the firm’s DNA. Client Advisors’ average tenure exceeds 20 years of service. That statistic is both unique in the industry and critically important in meeting the commitments the firm makes to its clients—many of which will literally last generations.

Based upon a deep belief that every family and each individual has unique needs, Whittier Trust’s holistic investment, fiduciary, philanthropic and family office services are consistently able to preserve and grow clients’ wealth. In an ever-changing world, continuity is a key element of Whittier Trust’s tailored experience—meeting both the unique needs of clients while achieving record growth year over year.

## About the firm

Whittier Trust is the oldest and largest private multi-family office headquartered on the West Coast. Whittier's wealth management platform serves 350 families and 30 foundations throughout the U.S. with over \$11 Billion in assets. The firm has helped individuals and families manage, grow and transfer wealth intergenerationally for six generations. Whittier Trust has offices in Los Angeles, San Francisco, Costa Mesa, Reno, and Seattle. To learn more, visit <http://www.whittiertrust.com>

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