
Whittier Trust

INVESTMENT & WEALTH MANAGEMENT

Your Wealth. | What does it mean to you?

Your passion guides our perspective.

Successful partnerships begin with one thing — trust. That very concept has been at the core of our business philosophy since we began with our first client, the Whittier family, more than 75 years ago. Today, we embrace that same concept as the largest multi-family office in the Western United States, tailoring solutions for affluent individuals and families in more than 30 states. Our business continues to prosper, precisely because trust remains at the heart of each and every relationship.

The exceptional level of attention you receive is a direct result of a staff steeped in experience that averages almost two decades of service. At Whittier Trust, you can rely on our wealth management professionals not only for the breadth and depth of their knowledge, but in the fact that your interests are always first and foremost. Our independence as a privately held company allows us to offer a perspective genuinely based upon your unique personal goals and aspirations rather than the priorities of a corporate agenda.

Because we know that protecting and growing your wealth is a team effort, we are adept at seamlessly integrating our services and professionals with your existing advisors — a partnership that creates synergies and benefits for you and your family. At Whittier Trust, the title of trusted partner is earned, it is protected, and it is unique to each and every client.

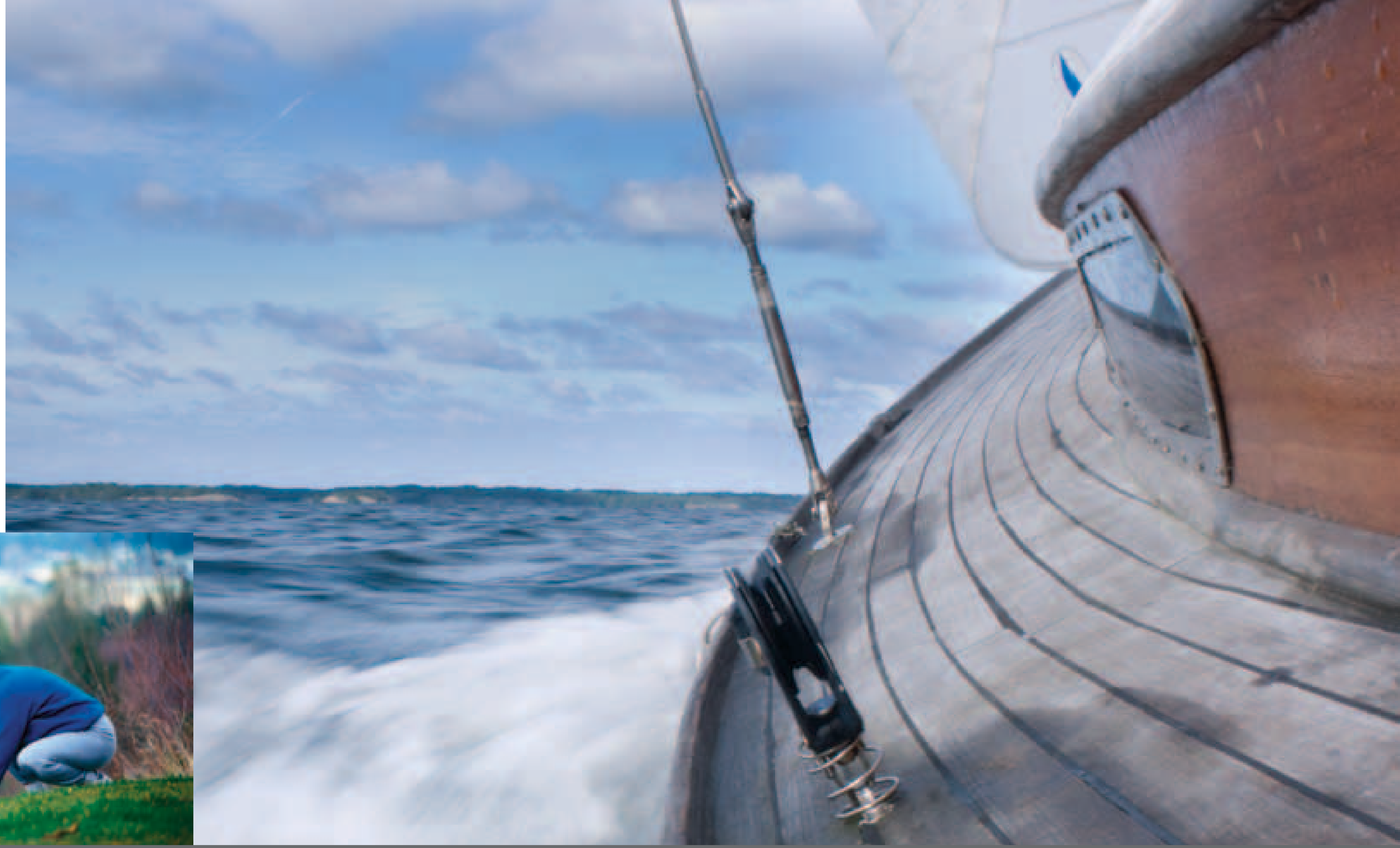
What does your wealth mean to you? The answer is different for everyone. And that is precisely the point.

What keeps you up at night? What makes you happy? What brings you peace of mind? Your answers reflect what is important to you, and in turn, what is important to us. So whether your wealth means freedom, security, giving back to your community or safeguarding your family's future, we recognize your passions and act as your dedicated advocate.

That advocacy begins by getting to know you as an individual. Our customized approach means we develop a deep understanding of both your immediate desires and long-term goals, allowing us to navigate opportunities that meet both. With a singular focus on your needs, and by predominantly serving affluent individuals and families, we offer a strategic combination that ensures our efforts are always aligned with what is important to you.

Your advocates are part of a consummate staff of professionals providing expertise on an extensive suite of services — from investment management and fiduciary services to philanthropy and family office services. Their dedication and knowledge build trusted relationships that grow to form valuable long-term partnerships.

At Whittier Trust, we have helped generation after generation accomplish goals, realize dreams and build legacies.



We pursue your goals as our own.

Expertise matters. Our team has the depth and breadth of knowledge and services to best meet your goals.

Whittier Trust's wealth management professionals provide unrivaled investment management, investment consulting, family office, fiduciary, and philanthropic services within an exclusive and highly personalized setting. Our professional staff is peerless at addressing the priorities and complex needs of the affluent.

A relationship often begins with a comprehensive, holistic review of your estate and tax plan, in coordination with your legal and tax advisors, and concludes with a strategic plan of action. We address important issues, such as legacy planning, tax management and insurance coverage, while assessing liquidity and cash flow needs. The result is a tailor-made strategy that can combine internal and external asset management with traditional and non-traditional asset classes that best support your unique needs.

Whittier Trust has helped protect, enhance and perpetuate real estate assets from our very beginning in the early 1900's. Today, we continue to oversee an extensive portfolio of residential and commercial real estate. Many of these holdings have been passed from generation to generation.

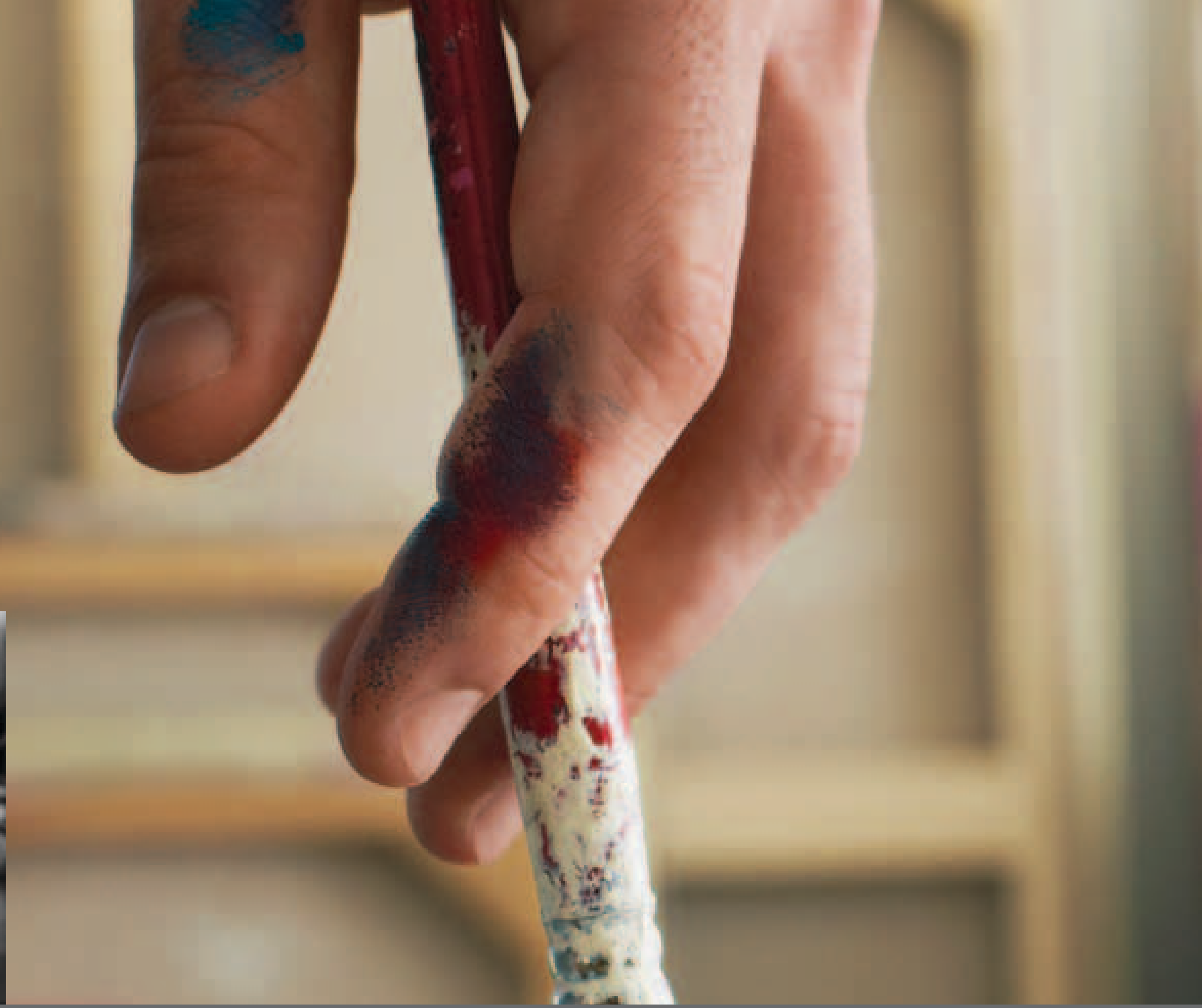
Our fiduciary capabilities combine modern expertise with traditional service to confidentially, independently, and impartially carry out trust terms and grantor wishes to protect your family as far into the future as you direct. With our Nevada Trust situs, we can offer additional choices allowing even greater flexibility and tax-saving benefits. Whittier Trust can serve as your agent should you choose to be your own trustee. Choose one, several, or all of our suite of services, including our core competencies of investment management and professional administration.

True to our family wealth legacy, we provide a full array of family office and philanthropic services personalized to your family's specific needs and dynamics. From bill pay, payroll or concierge services, to philanthropic solutions including day-to-day foundation management, our team works seamlessly to help minimize the demands upon your busy lifestyle.

At Whittier Trust, we take the time to identify your goals, appreciate your passions, and understand what matters most to you. That is more than our personal commitment, it is the way we have done business since we served our first family in 1935.

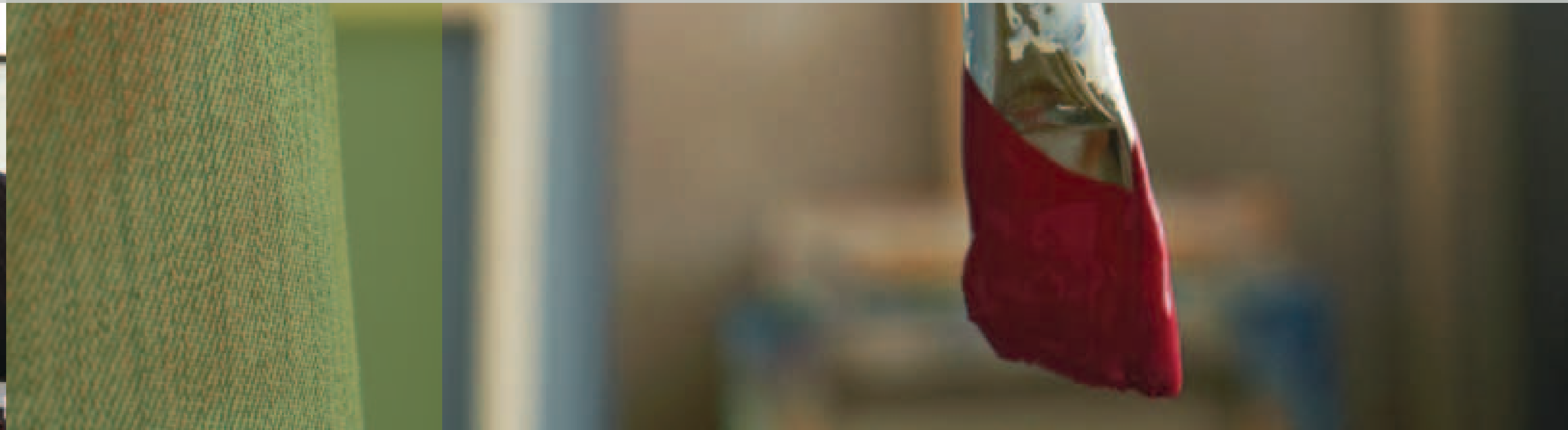
What does our personal approach mean? It means we offer one of the industry's lowest client-to-advisor ratios — a ratio that ensures our professionals have the time and focus to form a trusted partnership with you and your family. This often means that the next generation can have the same dedicated Whittier Trust professional working alongside them. Equally important, our team has the resources and expertise necessary to maximize opportunities and minimize risks. With our personalized approach, you have access to our family office services — imagine the freedom and flexibility to be able to delegate everyday responsibilities to us.

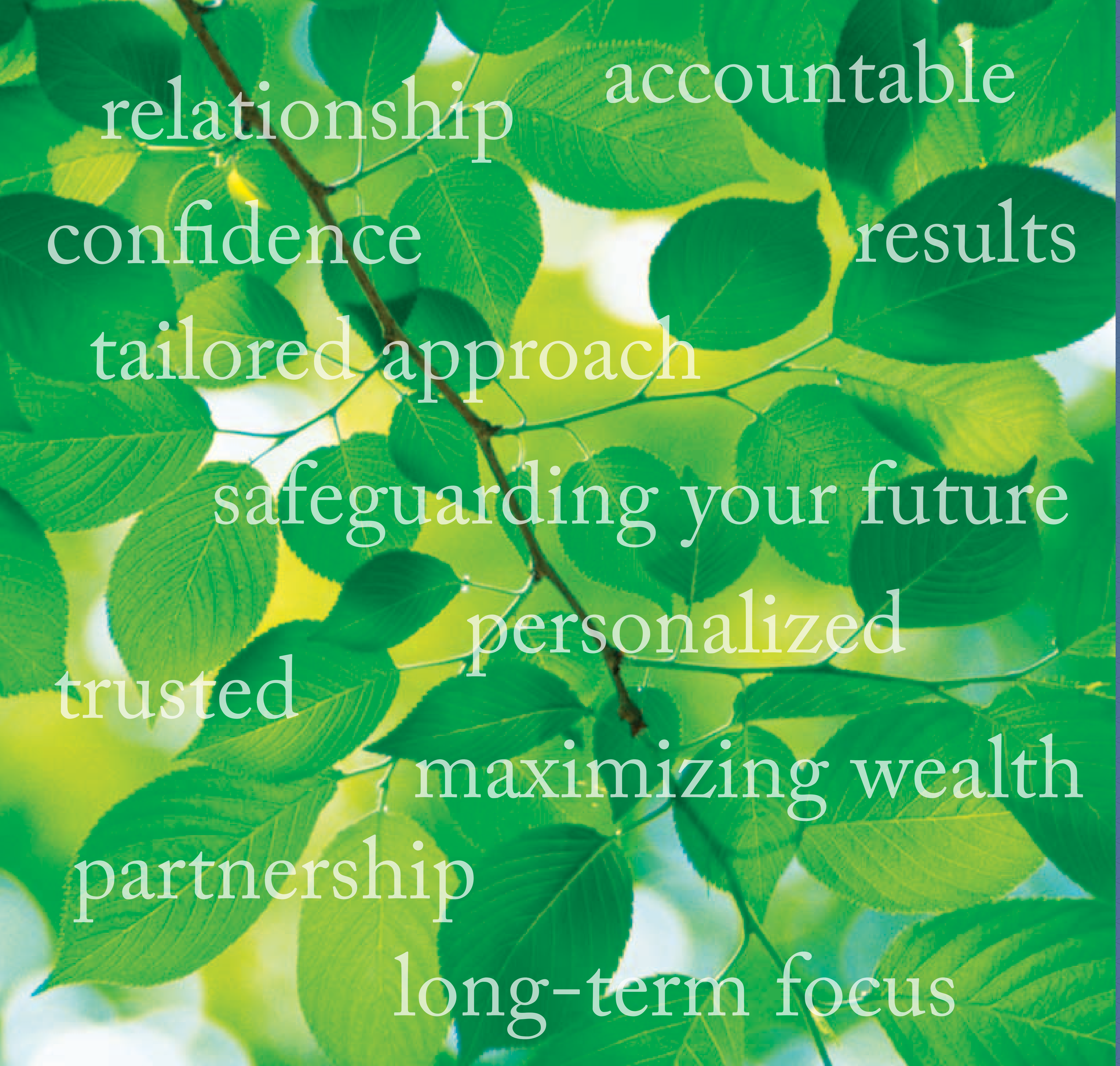
At Whittier Trust, personal commitment is something you will feel and experience day in and day out — from our holistic approach to the most minute of details. Our culture and our professionals thrive on creating personal solutions that reflect who you are…your priorities, your aspirations, and your goals. We invite you to discover the rewards of our personal commitment to you.



We take the time to do more than just listen, we hear you.

The result? Personalized services that deliver on your goals.






Understanding your values and goals. | WHAT IT MEANS TO US.

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