FAMILY WEALTH SERVICES

Chevy Chase Trust Family Wealth Services offers multi-generational wealth advice designed to achieve uncommon results. Our services extend beyond investment management into every facet of financial life for individuals and families with significant wealth and complex situations.

What We Do

Utilizing the depth and experience of our firm, we help our clients navigate through a broad array of challenging financial issues. Our work begins with understanding the unique circumstances of every client and continues through consideration of all the possibilities. With a careful and thoughtful approach, we collaborate with your existing advisors and other outside experts to ensure a well-coordinated and personalized plan. From Global Thematic Investing to financial, estate, fiduciary, tax, and philanthropic planning, we are dedicated to performing as your family office and delivering comprehensive, sophisticated wealth services today and for generations to come.

Our Services

Our staff of more than 115 professionals averages 17 years of experience managing the financial affairs of individuals and families. Each client has a dedicated team that works together to provide world-class service and attention to detail. This includes making asset allocation recommendations, managing disparate assets, focusing on planning as a guide to better decisions, facilitating communication, promoting understanding across generations and consulting with external advisors.

CCT Investment Management	CCT Family Wealth Services	External Resource Integration
▪ Global Thematic Equity	▪ Financial & Estate Planning	▪ Risk Management
▪ Taxable Fixed Income	▪ Fiduciary Services	▪ Insurance
▪ Tax-Exempt Fixed Income	▪ Custodial Services	▪ Real Estate Advice and Property Administration
▪ Cash Management (when appropriate)	▪ Aggregrated Reporting	▪ Facilitation of Banking Services
	▪ Philanthropic Advice	▪ Accounting & Tax Planning
	▪ Family Meetings	▪ Bill Pay Administration
	▪ Legacy Consulting	▪ Specialty Investments

Family Wealth Services provides a comprehensive advisory relationship and integration with external experts.

Investment Management

- Customized Global Thematic Portfolios
- Taxable Fixed Income
- Tax-Exempt Fixed Income
- Investment Manager Search, Selection & Oversight
- Specialty Investments

Financial and Estate Planning

- Balance Sheet Preparation
- Cash Flow Analysis
- Retirement Planning
- Educational Planning
- Monte Carlo Simulation and Stress Testing
- Restricted Stock and Option Oversight and Analysis
- Corporate Executive Services
- Estate Plan Document Review and Advice
- Estate Plan Flow Charting
- Gifting Strategies
- Generation Skipping Transfer Advice

Fiduciary Services

- Trust Management
- Estate Administration
- Custodial Services & Safekeeping
- Account Reporting
- Online Access and Download

Tax and Accounting Services

- Fiduciary Return Preparation
- Tax Advice and Management
- Bill Pay Administration

Risk Management

- Derivative and Options Strategies
- Debt & Interest Rate Protection

Insurance

- Advice & Oversight
- Life, Health & Long Term Care
- Property & Casualty
- Excess Liability (Umbrella)

Real Estate Advice

- Transactional Advice
- Financing
- Appraisals
- Property Administration

Banking Introductions/Facilitation

- Mortgages
- Asset-backed Lines of Credit
- Commercial and Small Business Lending

Philanthropic Advisory

- Legacy Planning
- Foundation & Endowment Creation and Management
- Charitable Gifting

Legacy Consulting

- Family Meetings
- Generational Transitions
- Family Business Succession Planning
- Next Generation Education