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. 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 125 professionals includes 21 investment team members who average 22 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.

Investment Management	Financial & Estate Planning	Family Wealth Services
▪ Global Thematic Equity	▪ Cash flow and balance sheet analysis	▪ Comprehensive multi-generational advisory relationship
▪ Taxable Fixed Income	▪ Retirement, legacy and education planning	▪ Private markets and alternative investments
▪ Tax-Exempt Fixed Income	▪ Corporate executive benefit management	▪ Concentrated holdings and special situations
▪ Cash Management	▪ Estate planning review and advice	▪ Pre-transaction strategies and exit planning
▪ Investment Administration	▪ Generation skipping transfer and gifting strategies	▪ Insurance advisory and administration
	▪ Philanthropic advisory and administration	▪ Banking and lending facilitation
	▪ Donor-advised funds and foundations	▪ Family governance and next-generation education
		▪ Cooperative partnerships with outside financial and professional advisors

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

Investment Management

- Global thematic equity portfolios
- Taxable fixed income
- Tax-exempt fixed income
- Cash management
- Specialty investments

Financial and Estate Planning

- Cash flow and balance sheet analysis
- Retirement, legacy and education planning
- Corporate executive benefit management
- Estate planning review and advice
- Pre-transaction strategies and exit planning

Fiduciary and Trust Services

- Impartial, professional corporate trustee and executor
- Trust and estate administration and settlement
- Accounting and reporting
- Custodial and safe keeping

Tax and Accounting Services

- Fiduciary return preparation
- Tax advice and management
- Bill pay administration

Philanthropic Advisory

- Philanthropic advisory and administration
- Donor-advised funds and foundations
- Charitable gifting strategies

Legacy Consulting

- Next-generation education and family governance
- Family business succession planning
- Generation skipping, transfers and gift strategies

Private Markets and Alternative Investments

- Private equity
- Private real assets
- Hedge funds
- Hard-to-value assets

Concentrated Holdings and Special Situations

- Tax-efficient diversification of concentrated stock
- Risk mitigation and income generation
- Direct indexing
- Exchange fund replication

Banking and Lending Facilitation

- Mortgages
- Asset-backed lines of credit
- Commercial and small business lending

Insurance Advisory

- Life, health and long-term care
- Property and casualty
- Excess liability (umbrella)

Real Estate Advisory

- Transactional advice
- Financing
- Appraisals
- Property administration