CIBC PRIVATE WEALTH

DISCOVER THE POWER OF PERSONALIZED ADVICE

Financial well-being isn't just a destination, it's a journey that a private wealth advisor can help you navigate.

From helping you reach milestones to creating a legacy for you and your family, we're committed to guiding you through every stage with advice and support tailored to you.

Navigate your financial journey with confidence

Every financial journey is filled with unique challenges and opportunities. Our wealth management services are tailored to anticipate these moments, offering a structured yet flexible plan that adapts to your evolving needs and goals. This isn't only about the numbers. It's about providing you with guidance during periods of volatility and building a roadmap to help you feel a sense of control over your personal wealth.

Your trusted partner for wealth management and growth

Financial paths are rarely straight. They twist and turn with life's events. With us by your side, navigating these turns becomes easier. Our access to a wide variety of expertise helps ensure each financial decision you make is informed and made with confidence by providing a blend of professional advice and personal understanding. Whether you prefer to be in the driver's seat or want us to navigate, we're with you every step of the way.

Advice and solutions tailored to you

The roadmap for reaching your financial goals shouldn't be a template. Your journey requires a nuanced approach. We are committed to aligning each piece of advice we offer with your specific goals. Our deep understanding of your financial circumstances lets us unlock customized solutions across a spectrum of services.

Building wealth confidently with your advisor

Up to 3.9x

growth in wealth after 15 years of investors working with an advisor compared to investors without advisors.[1]

74%

of mutual fund investors and 68% of ETF investors state that, because of their advisors, they have better saving and investment habits.[1]

84%

of mutual fund and 78% of ETF investors feel more confident that they will reach their investment goals when using an advisor.[1]

Beyond algorithms: The value of human advice

When it comes to financial management, the personalized touch combined with seasoned expertise provides what algorithms alone cannot. We invest the time to thoroughly understand your financial journey, crafting strategies that resonate with your personal, professional and family goals. We don't just manage assets. We build enduring relationships, guiding your wealth to not only grow but also thrive in a way that is the most meaningful to you.

90%

of clients managed by an advisor would not consider switching to digital while 88% of clients who are managed by a robo-advisor would consider switching to a human advisor.[2]

Wealth planning for every aspect of your life

Your vision for your financial future is a blend of your ambitions, stage of life and financial milestones along the way. This shifting narrative needs more than just a well-diversified portfolio. It requires a comprehensive, evolving wealth plan. We build this plan by engaging in a planning process that is tailored to your long-term vision and evolves with you by revisiting it regularly. Building on this foundation, we recognize that the cornerstone of informed financial decisions is rooted in the right advice. You have access to experts across the CIBC group of companies that will work with your network of external advisors to provide you with the insights you need to navigate these decisions with precision. The CIBC group of companies offers a broad spectrum of tailored solutions that can provide you with support with a comprehensive approach that encompasses:

Private Banking

- Full-service banking with a dedicated team
- Multi-currency credit solutions
- Cash and liquidity solutions
- Financial fluency for the next generation

Wealth Planning

- Retirement and cash flow planning
- Tax and estate planning
- Strategic philanthropy
- Business succession and family enterprise planning
- Planning for multi-generational wealth transfer

Investment Management

- Discretionary / Managed portfolios
- Full-service investment advisory services
- Exclusive and customized Capital Markets solutions
- Investment counsel
- Self-directed investing

Estate and Trust

- Professional executor and trust administration
- Executor and power of attorney appointments
- Agent for estate, trust and power of attorney
- Insurance counsel and solutions

Your partner in every step of your wealth journey.

Every financial milestone takes you one step closer to your vision. Connect with your CIBC Private Wealth advisor today to experience the value of professional advice and discover how partnering with us can shape your financial future.

[1] Through three separate years of investigation, the research found that after 15 years, investors accumulated 2.7 times more assets in 2010, 3.9 times in 2014 and 2.3 times in 2018 than comparable non-advised investors. IFIC. (2022, November). Financial advice in Canada . https://www.ific.ca/wp-content/themes/ific-new/util/downloads_new.php?id=27821&lang=en_CA

[2] Costa, P., & Henshaw, J. E. (2022, February). Quantifying the investor's view on the value of human and robo-advice. https://advisors.vanguard.com/content/dam/fas/pdfs/ISGHVD.pdf

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