ROCHDALE OFFSHORE
INVESTMENT MANAGEMENT

Thought Leadership in Protecting, Preserving and Building Wealth Through Offshore Diversification Strategies

Protecting and Preserving Your Wealth

There are compelling investment, market, geopolitical, and cultural themes driving the growing demand by affluent individuals, families and their advisors for offshore risk management, asset protection and diversification strategies. At the same time, developing and executing a comprehensive offshore strategy can often be challenging and unfamiliar for most.

By appropriately combining the turnkey services of an offshore trustee and an offshore custodian, each with no domestic presence and each domiciled in jurisdictions that favor the protection of trust assets, you still can employ the investment advisory services of a licensed domestic asset manager without compromising the protection of the trust assets.

This results in a unique opportunity for Rochdale Offshore Investment Management and our global partners to provide:

- Prudent risk management through global investment asset class, currency, geographic and jurisdictional diversification planning and investing
- A highly disciplined investment advisor that works with clients to develop the optimal mix of asset classes and investment styles, to maximize returns while minimizing risk on a tax efficient basis relative to their unique risk tolerance, experiences, income needs and investment time horizons
- Long-standing direct global investment management expertise in more than 40 countries, providing for a level of diversification of assets that simply can not be realized through traditional domestic channels
- The turnkey, specialized services, expertise and global resources of a U.S. Registered Investment Advisor, an offshore trustee if necessary and an offshore custodian at a transparent and most competitive price
- Optimal asset protection through premier offshore trustees and custodians
- Completely independent and essential service providers (Investment Advisor, Trustee, Protector and Custodian) offering a check and balance for their respective professional disciplines
- Online account access and comprehensive portfolio and tax reporting

In addition, by working with your tax advisors within the framework of Internal Revenue Code Sections 72, 7702 and 817 you can effectively convert your taxable trust portfolio income into non-taxable or tax-deferred income. You can now have the benefits of compounding your investment returns in a most tax efficient manner.

Rochdale Offshore Investment Management

Rochdale Offshore Investment Management is one of a select few financial service firms worldwide with both the expertise and the global relationships to provide comprehensive offshore asset protection and international financial services to individuals, families, institutions and their advisors.

Headquartered in New York City, Rochdale Offshore Investment Management is a division of Rochdale Investment Management, a Securities and Exchange Commission Registered Investment Advisor and affiliated with RIM Securities LLC, a registered broker/dealer with the National Association of Securities Dealers, respectively. Rochdale has a long history of providing full service investment counseling and portfolio management to affluent families and their advisors and currently manages more than $2.1 billion in assets globally.

Rochdale Offshore Investment Management

From an investment management perspective, Rochdale manages offshore portfolios in the following global asset classes:

- High Dividend and Income Equities
- Large Cap Growth Equities
- Large Cap Value Equities
- Mid Cap Growth Equities
- Mid Cap Value Equities
- Small Cap Growth Equities
- Small Cap Value Equities
- Government/Agency Bonds
- Corporate Bonds
- Municipal Bonds
- International Equities (Global)
- International Fixed Income (Global)
- Alternatives
- Hedge Funds (Global)

Rochdale's offshore and international capabilities (including the U.S.) are rooted in managing highly customized separate account and fund portfolios in both equities and fixed income, on a direct multi-currency basis, for many developed and emerging publicly-traded markets around the world (e.g., China, Korea, Australia, Switzerland, Germany and the United States).

Rochdale has a long-standing history of working with clients to develop the optimal mix of asset classes and investment styles, to maximize returns while minimizing risk on a tax efficient basis relative to each client's unique risk tolerance, experience, income needs and investment time horizon.

Through Rochdale and its global partners, clients receive sophisticated, comprehensive and personalized investment counseling and planning services including:

- Asset protection
- Risk profiling, management and investment policy development
- Comprehensive global investment management expertise
- Detailed analysis and review of existing portfolio holdings
- Wealth simulations and planning objectives for cash flow
- Capital gains tax deferral strategies for highly appreciated assets
- Converting taxable portfolio income into non taxable income
- Income tax deduction and estate tax planning

"Uniquely, Rochdale bridges the cultural, language, time zone and investment management experience gap that Settlors or Beneficiaries of an offshore trust require for peace of mind. We work seamlessly with numerous offshore custodians, trust companies, protectors and insurance providers on a daily basis, beginning with new account openings, custody, trading, administration, operations, technology, compliance, client reporting and more. Our collective core-expertise is completely focused on those clients that recognize the need to better manage their risks through offshore or global planning and investing."

- Neal B. Rubin, Managing Director of Rochdale Offshore Investment Management

Offshore Custody

Rochdale Offshore Investment Management has longstanding relationships with numerous leading offshore custodians, including Credit Suisse, LCF Rothschild Group, Pictet & Cie, VP Bank, Coutts Bank Von Ernst and others.

As each client is unique in their objectives and needs, Rochdale provides for the most flexible solutions and capabilities in all aspects of its business, in an effort to provide optimal asset protection and investment management options.

Summary

Rochdale Offshore Investment Management, along with its strategic partners, provides a global offering of financial services to individuals, families, institutions and their advisors. Rochdale’s offshore platform provides complete turnkey, offshore banking, custody, asset protection, insurance, brokerage and investment management services, more cost effectively than any other institution in the market.

For More Information

For further information regarding Rochdale Offshore Investment Management and its global asset management capabilities, please contact the following:

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