

## Convergent Capital Management

### Company Overview

Convergent Capital Management is a diversified asset management holding company. As of March 31, 2008, the firm consists of 8 affiliates with approximately \$30 billion in assets under management. CCM's affiliates provide world-class investment services to individuals and institutions throughout the United States.

Convergent Capital Management's parent company is City National Corporation (NYSE: CYN), a publicly-held financial services firm with a long-term commitment to the asset management business.

### Progressive Partnership

Convergent Capital approaches its relationship with its affiliates as a Progressive Partnership. A Progressive Partnership is one in which CCM serves not only as our affiliates' financial partner, but also as their trusted advisor.

CCM operates on three key principles:

- **Shared ownership** - Equity is a key motivator for our affiliates.
- **Independence** - Affiliates maintain operational autonomy.
- **Adding value** – Affiliate organizations are CCM's clients.

### Strategies for Growth

CCM's strategy is to generate growth by adding new affiliates as well as by fostering the growth of existing affiliates.

We invest in a broad range of asset management and related firms, including investment counselors, asset managers and distribution platforms.

### Affiliates

- AMBS Investment Counsel, Grand Rapids, MI
- CCM Advisors, Chicago, IL
- Clifford Swan Investment Counsel, Pasadena, CA
- Convergent Wealth Advisors, Rockville, MD
- Independence Investments LLC, Boston, MA
- Mid-Continent Capital, Chicago, IL
- Philip V. Swan Associates, Pasadena, CA
- SKBA Capital Management, San Francisco, CA

### Capabilities

CCM Affiliates provide a wide variety of outstanding products and services to individuals and institutions throughout the United States including:

- US Value Equity
- US Growth Equity
- US Core Equity
- Socially Responsible Equity
- US 130/30 Strategies
- International Equity
- Balanced Portfolios
- Core Fixed Income
- Intermediate Fixed Income
- Short Term Fixed Income
- Alternative Investments
- Investment Counseling Services
- Charitable Remainder Trust Management and Administration

To learn more about CCM, visit our website at [www.convergentcapital.com](http://www.convergentcapital.com)

### Headquarters

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