



CIBC Atlantic Trust Receives FWR Awards for “Leading Individual Multi-Family Office,” “Women in Wealth” and “Private Client Investment Platform”

ATLANTA, March 19, 2018—CIBC Atlantic Trust Private Wealth Management received the following awards at the 2018 *Family Wealth Report (FWR)* awards ceremony, held in New York on March 9:

- **Leading Individual (Multi-Family Office)** conferred to John S. “Jack” Markwalter, Jr., chairman and CEO of CIBC Atlantic Trust and head of CIBC’s US Private Wealth Management business;
- **Women in Wealth (Individual—Wealth Management Organizations)—Highly Commended** conferred to Kimberly A. Dwyer, managing director and senior relationship manager; and
- **Private Client Investment Platform**

“These awards are significant achievements for Jack, Kim and our Investment Team, and are true testaments to their ongoing commitment delivering the highest-quality client experience,” says Larry D. Richman, senior executive vice president and group head of CIBC’s US Region and president and chief executive officer of CIBC Bank USA.

Family Wealth Report is a leading trade publication covering news and other developing stories in North American wealth management, family office and high net worth/ultra-high net worth sectors. *FWR*’s awards program recognizes companies, teams and individuals within the banking and wealth management industries that the publication deems best-in-class and that “demonstrate innovation and excellence” in their respective fields.

Leading Individual (Multi-Family Office)

In 2017, Markwalter assumed an expanded role as head of private wealth management for CIBC’s U.S. region following CIBC’s acquisitions of The PrivateBank (now CIBC Bank USA) and Geneva Advisors (now part of CIBC Atlantic Trust). His long-held vision is for CIBC Atlantic Trust to be recognized as the ‘go-to’, highest-quality private wealth management firm for affluent individuals and families in North America.

Markwalter has led CIBC Atlantic Trust for over 14 years, emphasizing investment excellence, deep wealth and legacy planning expertise, high-touch client service, improved technology and strong employee engagement and development. Under his leadership, the firm has grown from \$8B to more than \$41B AUM and has achieved 43 consecutive quarters (more than 10 years) of growth.

In addition to serving as chairman and CEO of CIBC Atlantic Trust, Markwalter serves on the CIBC Operating Committee and sits on CIBC’s U.S. Executive Committee. Markwalter

joined CIBC Atlantic Trust in 2002 as head of business development and has more than 31 years of experience in the private client and investment industry. From 2005 to 2013, he also served as senior managing director of Invesco and as a member of the Invesco Executive Management Committee. From 2008 to 2010, he was head of Invesco U.S. Institutional Sales, Client Service and Consultant Relations, as well. Prior to joining CIBC Atlantic Trust, Markwalter served as managing director and national director of the client strategy group for Morgan Stanley Private Wealth Management. He earned a Bachelor of Science with highest honors from the Georgia Institute of Technology and a Master of Business Administration from the Harvard Graduate School of Business.

Women in Wealth (Individual—Wealth Management Organizations)—Highly Commended

Dwyer has demonstrated sincerity, focus and insight-filled dedication to her clients in the nearly 20 years that she has been a part of CIBC Atlantic Trust. She exhibits an ideal balance of professionalism, knowledge and humility that enables her to connect with her clients. She also serves as a role model, both in the office as she mentors team members, and outside as a community leader and volunteer.

Dwyer is a senior relationship manager with more than 30 years of experience in the trust and investment management industry. In this role, her primary focus is providing comprehensive client service through investment and wealth management solutions that incorporate estate and tax planning strategies. She began her career at State Street Bank & Trust Company, where she was a trust officer and portfolio manager. Most recently, she was an associate vice president at Eastern Bank & Trust Company. Dwyer earned a Bachelor of Science from Brigham Young University and is a graduate of the New England School of Banking at Williams College. She is a member of the Boston Estate Planning Council and also serves as a board member for the Boston chapter of the BYU Management Society.

Private Client Investment Platform

CIBC Atlantic Trust's Investment Team, led by Chief Investment Officer David L. Donabedian, CFA, has been recognized once again for the excellence of their investment platform.

This is the **fourth consecutive year** that CIBC Atlantic Trust has received recognition from *FWR*, and the third for the firm's investment excellence. In previous years, *FWR* has recognized CIBC Atlantic Trust in the following categories:

- **Private Client Investment Platform**, 2017
- **Private Client Investment Platform (Highly Commended)**, 2016
- **Leading Individual (Multi-Family Office)—David L. Donabedian, CFA, and Multi-Family Office (Client Initiative)**, 2016
- **Best Multi-Family Office**, 2015

This is the second time CIBC Atlantic Trust has been recognized this year. In February, the firm received *PAM's* award for **Best Investment Platform—Performance**.

About CIBC Atlantic Trust Private Wealth Management

CIBC Atlantic Trust Private Wealth Management serves as a trusted advisor to private clients and select foundations and endowments, with over \$41 billion in assets entrusted to our care (as of December 31, 2017) and offices in 14 locations across the U.S. Our firm delivers a robust complement of investment management, wealth strategies and legacy planning, and National and Delaware chartered trust services, with access to private banking, deposit and lending services through our affiliate, CIBC Bank USA. For more information, visit www.cibcatlantictrust.com.

About CIBC

CIBC (NYSE: CM) (TSX: CM) strives to build trusting and enduring relationships by putting our clients at the center of all we do. Through CIBC Bank USA, we offer tailored commercial, wealth management, personal and small business financial solutions. CIBC is a 150-year-old Toronto-based, global financial institution with our U.S. headquarters in Chicago. Visit us at cibc.com/US.

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About *Family Wealth Report Awards*

In 2018, Jack Markwalter was one of eight candidates shortlisted for Leading Individual—Multi-Family Office and the only recipient of this award. The award recognizes an individual working in the private client world. Kimberly Dwyer was one of eight candidates shortlisted for Women in Wealth Management (Individual – Wealth Management Organizations) and the only candidate “highly commended” in this category. The award recognizes a woman in private banking or wealth management determined by a panel of judges to be an inspiration to female clients and colleagues. CIBC Atlantic Trust was one of eight firms shortlisted for Private Client Investment Platform and the only firm to receive this award. The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community. In 2016 and 2017, CIBC Atlantic Trust was one of five firms shortlisted for the “Private Client Investment Platform” award. It was the only firm to receive the award in 2017 and the only firm to be highly commended in this category in 2016. In 2016, CIBC Atlantic Trust was one of five firms shortlisted for the “Multi-Family Office (Client Initiative)” award and the only award recipient. The award recognizes new initiatives for clients from multi-family offices of any size or reach. In 2016, David Donabedian was one of three candidates shortlisted for the “Leading Individual (Multi-Family Office)” award and the only award recipient. In 2015, CIBC Atlantic Trust was one of seven firms shortlisted for the “Best Multi-Family Office” award and the only award recipient. This award recognizes multi-family offices with a genuinely national reach. All of these awards are determined by a panel of judges’ review of questionnaires.

About *Private Asset Management Awards*

The detailed information provided by CIBC Atlantic Trust for the Best Investment Platform – Performance award included information on both internal and external strategies. In 2018, Eight firms were shortlisted for this award, and CIBC Atlantic Trust was the only firm to win. PAM annually invites firms to compete for awards in several categories that are reviewed by a panel of independent industry experts. PAM considers the following criteria when selecting the winners of these awards:

- Financial progress: Candidates must be able to demonstrate performance track records over the course of the last 12 months.
- Growth: Client numbers, internal hires and geographic expansion
- Client satisfaction: Provide evidence of client satisfaction
- Product innovation: Details of new services and products launched over the course of the year prior to the year the award is given

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