



# Notable Firm Facts

## Background

- Founded in 1963
- Manages over \$4 billion for around 5,000 clients\*\*
- With local representatives throughout the country - from California to New York
- Managed Through 11 Bull & Bear Market Cycles
- The entire Portfolio Management Team has been intact together for over ten years - rare in the RIA space
- Some of the Senior Management Team have been together since 1969
- 97 employees nationwide\*\*
- Fred Fern founded Churchill Management Group. He named the firm after a great historical figure - Winston Churchill. His childhood friend Michael, son of John Wayne, made the suggestion.
- Average client account size is approximately \$750k\*\*

## Awards\*

- Fred Fern, CEO, has won multiple awards. Most notably he was ranked #1 on Barron's Top 100 Independent Advisors - 2016
- Fred Fern was more recently ranked in **Barron's Top 1200 Advisors** by State in California for 2017
- Fred has been in the top 10 on **Barron's list of the Top 100 Independent Advisors** for six years in a row
- The firm was named in the Top 300 Registered Investment Advisers - 2016, by the Financial Times
- The firm was named Largest Money Management Firm in L.A. County - 2016 by Los Angeles Business Journal
- The firm was named in the Top100 RIAs of 2015 by [wealthmanagement.com](http://wealthmanagement.com)

## Approach

- Fred learned from Bill O'Neil, the founder of Investor's Business Daily, that you must have a policy that incorporates stop-loss principles. This is why Churchill follows technical, fundamental and sentiment factors and uses them to make the firm's investment decisions within certain tactical strategies.
- Churchill charted the market's performance dating back to 1915 on a daily basis. The charts illuminate high and low risk points which may signal investment opportunities.
- Fred developed his own investment philosophy, which stresses:
  1. History repeats itself
  2. You have got to have discipline
  3. It is important to have the goal of keeping your losses small
- From these principles, Fred developed his signature and now firm-wide tactical approach - "Aim to grow capital in favorable markets and protect it in less favorable, high-risk environments." The tactical strategies can be blended with fully invested strategies aiming to best achieve clients' individual goals. In addition, the firm may offer complimentary Financial Planning which assists in achieving Clients' expectations.

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\*\*AUM, number of employees, average account size, and number of clients are as of 3/31/17 and may have increased or decreased since this date.

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### \*SEE IMPORTANT DISCLOSURES HERE:

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