Churchill
Management
Group

Churchill Management Group

Goal of Creating Wealth Over The Long Term

Churchill Management Group is committed to the goal of helping our clients maintain their wealth over the long term, with a strong emphasis on growth and capital preservation. We offer financial planning and a multitude of portfolio options to suit our client's risk appetite, time horizon and personal objectives.

Founded in 1963 by award-winning investment advisor Fred Fern, Churchill has managed portfolios through 11 Bear and Bull markets, including the turbulent markets of the 1960's and 1970's. Best known for our unique Tactical Strategies, where we stay invested in apparent low risk markets and reduce exposure in perceived high risk markets, our clients have entrusted us to not just manage their assets, but their financial future.

As a client-focused firm, we are known for building long-term relationships. Many of our clients have been with us for decades.

RECOGNITIONS

Top 1200 Advisor by State in California - 2017
Barron's

#1 Top 100 Independent - 2016
Barron's

300 Top Registered Investment Advisers - 2016
Financial Times

#3 ETF Sector Rotation First Quarter - 2016
Morningstar

Largest Money Management First in L.A. County - 2016
LA Business Journal

Top 100 RIAS of 2015
wealthmanagement.com

Key Advantages

DUAL APPROACH TO STRATEGY
We look to use a blend of Tactical and Fully Invested strategies to navigate market dynamics, understanding that each approach may perform better or worse depending on where we are in the stock market cycle.

EXTENSIVE MARKET EXPERIENCE
Our senior Management Team has over 150 years of combined hands-on experience managing investments. They have worked through multiple market cycles and this experience is reflected in the strategies they manage.

PERSONALIZED CUSTOMER SERVICE
We build relationships with our clients and provide them with a dedicated service team to make sure we have consistent communication and a clear understanding of their unique goals and needs.

FINANCIAL PLANNING
We can offer Financial Planning to thoroughly understand client's circumstance, expectations and goals. Our financial planning experts take a holistic approach and include life and circumstance changes.

Investment Philosophy

The Churchill Management investment approach is built around important guiding principles aiming to help our clients reach their specific goals and objectives based on their unique risk profile. We achieve this by developing technical, fundamental and sentiment indicators for our tactical strategies to guide us through market and economic cycles. Our understanding of these cycles, time tested over a 50 +year period, serves as reference points for us to make investment decisions.

Our Investment Goal: Make it and Keep it

"Our firm's founding principle is that we believe that the most effective way of mitigating risk is to look at markets cyclically and in segments."

- Fred Fern, CEO & Chairman