

Financial Advisory Firm Churchill Management Group Earns Consecutive Barron's Top Ranking in California and Nationwide

(Los Angeles, CA) April 2017 – Fred Fern, CEO of Churchill Management Group, a California-based financial advisory firm, continues to receive recognition, ranking among the nation's leading advisors. The eight-year ranking string solidifies Mr. Fern among the nation's top independent investment advisors and underscores the deep investment expertise offered by the entire financial advisory team at Churchill. Barron's, the world's premier investing publication released their annual rankings for "America's Top 1200 Financial Advisors List" with Mr. Fern among the top advisors for the state of California for 2017. This recognition comes on the heels of Mr. Fern being named as the #1 Independent Financial Advisor across the nation in late 2016. The ranking reflects a proprietary Barron's formula containing three major components: assets managed, revenue produced and quality of practice. This recent national and California ranking adds to a growing list of accomplishments by Churchill Management Group, including The Financial Times' "2016 300 Top Registered Investment Adviser List," "Largest Money Management Firm in L.A. County" - 2016 by Los Angeles Business Journal and WealthManagement.com's "Top100 RIAs of 2015" (See link to disclosures below)*.

Churchill's 50+ year track record of successful results, in part due to their flagship tactical strategies, provides an edge in the highly competitive space of registered investment advisory firms. With a stable Management Team that has invested in both up and down markets across a half of a century, Churchill's tactical strategies use a simple approach, as Mr. Fern explains, "We aim to grow capital in favorable markets and protect it in less favorable, high-risk environments." For many of these investment strategies, technical, fundamental and sentiment market indicators are used as tools in a "top-down" manner for asset allocation while the investments are evaluated from a "bottom-up" perspective.

"When the market exhibits risky signs, we like to take a step back. Then we try to take advantage of the low hanging fruit and capture our gains in perceived low risk markets. We let the market tell us what to do; when it says get out, we get out," says Mr. Fern. With both this tactical expertise focused on building and preserving wealth and its over 50-year track record of delivering an effective client investment experience, Churchill Management Group is focused on continuing the attributes that have made Fred Fern the #1 Independent Investment Advisor on Barron's for 2016.*

Mr. Fern's philosophy and reputation traces back to a challenging experience when he sustained an investment loss in IBM as a young man in the 1960's. Rather than discouraging Mr. Fern, this sparked his interest in the deep intricacies of what drives market volatility and performance—something he continued to study and pass on over the last five decades. Fred learned from Bill O'Neil, the founder of Investor's Business Daily, that you must have a stop-loss policy and he ultimately developed his own investment philosophy that has become his signature and now firm-wide approach. The foundation is built on these three key points: history repeats itself, discipline is important, and aim to keep losses small.

Churchill realizes investors choose different paths in achieving their financial independence and offers an ability to customize portfolios based on individual needs and performance expectations. Churchill is comprised of an executive team that bolsters over 150 years of experience with attractive tactical strategies, often paired with fully invested strategies, that positions the client with an eye on the specific results needed to build and maintain wealth.

About Churchill Management Group

Churchill Management Group is a Registered Investment Advisor that was founded in 1963 by award-winning advisor Fred A. Fern, CEO and Chairman. Numerous years of experience have allowed Churchill to invest in all types of markets, including the turbulent markets of the 1960's and 1970's. The firm charted the market's performance dating back to 1915 on a daily basis. The experience and in-depth research taught the firm that by placing an emphasis on a goal of growth with preservation of capital under one of Churchill's tactical strategies investors can typically achieve their unique financial goals. To create an investment approach that is suited to each client's needs, the firm offers a selection of equity strategies. In addition, the firm may offer complimentary Financial Planning which assists in achieving Clients' expectations and goals. Churchill manages over \$4 billion with an average client account size of approximately \$750k for around 5,000 clients and has offices across the country from California to New York.

**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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