

# Robert Levy Named Director of Investments at Whittier Trust

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Robert Levy's Appointment Reinforces Whittier Trust's Commitment to Strategic Growth and Investment Excellence

RENO, NV / ACCESSWIRE / September 26, 2024 / Whittier Trust, the oldest multi-family office headquartered on the West Coast, is proud to announce that Robert L. Levy has been elevated to the role of Director of Investments for Whittier Trust Company of Nevada, Inc., as a reflection of his continued dedication and contributions to the firm. In this new role, Robert helps oversee the company's investment strategy, leads a highly skilled investment team and spearheads the identification and execution of key investment opportunities while guiding client investment policy objectives.

David Dahl, President & CEO of Whittier Trust, commented on Robert's remarkable career, stating, "Robert has been with Whittier Trust for more than two decades and has consistently demonstrated exceptional investment, acumen and leadership. His track record in identifying profitable opportunities has been instrumental in driving the growth of our investment strategies. We are confident that under Robert's leadership, our clients will continue to benefit from our firm's robust investment approaches."

Robert's tenure at Whittier Trust began in December 2000, and his contributions have been critical in helping the firm and its clients navigate many complex and unprecedented market cycles. He has played a key role in growing both client portfolios and the firm itself.

As Director of Investments, Robert has a pivotal role in shaping Whittier Trust's investment philosophy, creating customized strategies for clients, and overseeing the firm's flagship large-cap equity strategy, known as Corporate America. He will also continue to serve on Whittier Trust's committee that analyzes, selects, monitors, and advises

on external investment managers, ensuring that clients have access to top-tier advisors and exceptional investment guidance.

Robert is an active member of the Nevada community, where he serves on the boards of Whittier Trust Company of Nevada, Big Brothers Big Sisters of Northern Nevada and the Renown Health Foundation. His commitment to giving back is also reflected in his role as Trustee of the Joshua L. Anderson Memorial Foundation and College Scholarship Fund.

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#### About Whittier Trust

Collectively, Whittier Trust Company and The Whittier Trust Company of Nevada, Inc. (referred to herein individually and collectively as "Whittier Trust") are state-chartered trust companies wholly owned by Whittier Holdings, Inc. ("WHI"), a closely held holding company. As the oldest multi-family office headquartered on the West Coast, Whittier Trust isn't just a financial institution, it's a trusted partner with a long, rich history of successfully navigating the financial markets to preserve, protect, and enhance its clients' wealth and well-being across generations. Whittier Trust operates with the singular focus of providing holistic, top-tier client service and highly personalized investment solutions to ultra-high-net-worth individuals and their families designed to advance and secure their long-term financial legacies and goals. The firm has offices in Pasadena, San Francisco, Menlo Park, Newport Beach, West Los Angeles, Reno, Seattle and Portland. To learn more, visit <http://www.whittiertrust.com>.

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