



## AN INTRODUCTION TO OUR FIRM

A MEANINGFUL HISTORY. A CONFIDENT FUTURE.

**C**OPARTNERSHIP NOTICE—E. W. CLARK & CO., Philadelphia, and J. W. CLARK & CO., Boston, have formed a connection in the Exchange and Commission Business in New York, under the firm of E. W. CLARK, DODGE & CO., at No. 60 Wall street, and having correspondents in all the principal cities and towns in the Union, they are enabled to make collections of notes and bills of exchange at the lowest rates, and with the utmost promptitude. They are also prepared to purchase all kinds of bank notes and exchange upon the principal cities. Drafts upon all prominent points can always be had in sums to suit. They respectfully solicit a share of public patronage.  
New York, August 11th, 1845. a11 2w&2wend

*Notice establishing Clark Dodge & Co. is posted in the New York Journal of Commerce on August 11, 1845.*

established the first of several stock and exchange houses in Philadelphia with \$15,000 of capital. By 1845, the Clark Banking System was so successful that the New York house at 60 Wall Street was established with \$50,000 of capital under the banner of Clark Dodge & Company.

The company would be instrumental in the financing of bonds that supported government efforts during the Mexican-American War (1846-1848) and the U.S. Civil War (1861-1865) as well as the building of the Union Pacific Railway (1862).

In 2010, the formation of Clark Dodge Asset Management is a continuation of what these earlier efforts represented: a trusted and reliable partner working with clients to achieve their most important financial goals.

With the 165th anniversary of its founding, Clark Dodge & Company continues the tradition of our founders with the launch of Clark Dodge Asset Management, a registered investment advisor that claims a rich heritage and Clark Dodge's cornerstone values of trust, loyalty and integrity.

Our history dates to 1837 when brothers-in-law Enoch W. Clark and Edward Dodge

## CORE PRINCIPLES

Clark Dodge Asset Management's investment principles are rooted in the belief that clients' trust in our stewardship be rewarded with enduring returns. Our core belief is that asset management begins and ends with the investment needs of our clients. Every portfolio we create is uniquely tailored to our clients' individual goals and we take pride in formulating long-term, rational investment strategies to reach their objectives.



## BUILDING A SOLID FUTURE:

The most valuable service we can provide as a firm is our ability to fulfill our clients' needs today and contribute to the legacy they wish to leave for future generations.

We focus solely on private, holistic wealth management including financial, estate and retirement planning as well as discretionary investment management and consulting. Our counsel is independent, objective and based on sound research and fundamental analysis. We advocate a well diversified portfolio structure, take a global view of opportunities and actively rebalance investments as changes in the economic environment require.

As relationship-driven investment managers, clients' needs determine the required return on capital and we carefully select asset classes that reflect those individual obligations and goals. Every investment decision is rigorously examined and portfolio holdings are chosen for their potential growth, valuation and long-term opportunity. The entire process is transparent and risk evaluated at every step.

Our wealth management outlook today is true to the legacy of our founders and underlies our commitment to a *Return on Trust*.

### CLARK DODGE ASSET MANAGEMENT INVESTMENT ADVISORY BOARD:

Our own in-house research efforts are informed by the Clark Dodge Asset Management Investment Advisory Board (IAB) and supplemented by institutional sources. The IAB is chaired by Clark Dodge Asset Management President Michael R. Sanders and was established to provide objective and independent global capital markets analysis and research.

In addition to the chairman, the IAB is comprised of six members, forward-thinking experts in finance with extensive hands-on investment & capital markets experience. Each brings a multi-disciplined background to the IAB including expertise in: global real estate and credit markets, distressed asset research, energy, commodities, equities, foreign currency, financial services & economics.

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