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Arnerich Massena Expands Its Institutional Discretionary Portfolio Management Services Within the Foundation and Endowment Marketplace

PORTLAND, Ore., June 21, 2011— [Arnerich Massena](#) Inc., a Portland, Oregon-based independent investment advisory firm, recently expanded its discretionary portfolio management services to its institutional clients. The firm has provided discretionary management services for high net worth families and private foundations for the past five years, and is now expanding its service model to the broader foundation and endowment marketplace.

Also called an “outsourced CIO model,” discretionary portfolio management can improve an advisor’s ability to actively manage and improve long-term outcomes for clients.

“Our discretionary services allow our clients to focus on overall investment strategy and portfolio performance rather than day-to-day portfolio management,” said Sheree Arntson, lead advisor of the discretionary initiative. “We manage the tactical allocation, rebalancing, cash flow and product/manager selection — allowing our investment committee members to focus their limited time on the big picture.”

As fiduciaries face increasingly complex investment environments, greater due diligence requirements, and limited financial resources, these comprehensive discretionary portfolio management services can reduce fiduciary exposure and ease the burden on an organization’s internal resources.

“With more than 20 years of experience serving investment committees, we believe this model is a much more efficient method of serving the institutions and the volunteer fiduciaries,” added Arnerich Massena’s CEO and CIO Tony Arnerich.

About Arnerich Massena

Founded in 1991, Arnerich Massena is a Portland-based independent investment advisory firm servicing corporations, institutions, state and local governments, charitable organizations, trusts and estates, corporate pension and profit sharing plans, and private clients. More information is available at www.arnerichmassena.com.