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Arnerich Massena Announces the Hire of James Ellis, CFA, as Senior Consultant

PORTLAND, Ore., July 10, 2018 — Portland-based investment firm Arnerich Massena announced today that James Ellis, CFA, has joined the firm as a senior consultant in the company's Institutional Services department. Mr. Ellis will serve clients ranging from corporate retirement plan sponsors and professional organizations to endowments and foundations. He will provide a full range of consulting services, including plan design and management, asset allocation and portfolio management, and fiduciary education.

Terri Schwartz, managing director of institutional services and principal, states, "We are thrilled that James is joining our team. His years of experience and knowledge of the industry will be of great benefit to our clients. He's a great fit with our firm's culture, and we think our clients will really appreciate what he brings to the table."

Mr. Ellis is experienced in guiding fiduciaries to meet their strategic goals, with experience working with foundations and endowments, healthcare institutions, corporate and non-profit defined benefit and defined contribution plans, and Taft-Hartley Plans. He brings 20 years of experience in the financial services industry, most recently as director of institutional consulting for Buck Consultants, where he advised institutional clients on the development of investment policies, asset allocation, plan design, de-risking strategies, investment and menu structure, and fund evaluation, as well as implementing custom client solutions. Read his complete biography [here](#).

CEO and principal Tony Arnerich is pleased with the new hire. "It's terrific to see our team grow; James is a talented professional and a wonderful addition. Our goal, as always, is to deliver individualized client solutions, unparalleled service, industry thought leadership, and insight, and our institutional group has the depth and experience to make it happen."

Arnerich Massena is continuing to grow both its institutional consulting group and the firm's wealth management division, serving clients in the Northwest and across the country with world-class investment research, portfolio management, and retirement plan consulting. The company is pleased to be hiring qualified individuals to meet the demand for its services.

About Arnerich Massena

Founded in 1991, Arnerich Massena is a Portland-based independent investment advisory firm servicing corporate pension and profit sharing plans, endowments, foundations, charitable organizations, private clients, and trusts and estates. The firm provides traditional portfolio management and investing for clients, and is also widely known for successfully investing in high-impact areas like water resources, sustainable agriculture, fishing, healthcare, and clean energy technology. Arnerich Massena strives to be a business that exemplifies both corporate citizenship and professional service, and has received awards for its innovations in corporate philanthropy. More information is available at www.arnericmassena.com.