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**Arnerich Massena Announces Philanthropic Advisor Katherine Fox Has Earned the Chartered Advisor in Philanthropy (CAP®) Designation**

**PORTLAND, Ore.**, July 8, 2019 — Portland-based investment firm [Arnerich Massena](#), an independent investment advisory firm specializing in private wealth management, endowment & foundation, retirement plan consulting services, and impact investing strategies, is pleased to announce that philanthropic advisor and planner Katherine Fox, CFP®, CAP®, has earned her Chartered Advisor in Philanthropy (CAP®) designation. The CAP®, administered through the American College of Financial Services, is an advanced charitable giving curriculum providing advisors with the knowledge they need to help clients clarify what they wish to accomplish for themselves, for their heirs, and for society; to evaluate the amount, structure, and impact of charitable gifts; and to integrate charitable strategies into their financial plan, business exit strategy, and/or estate plan.

“Philanthropy is such a fundamental component of Arnerich Massena’s philosophy and vision,” says CEO and firm principal Tony Arnerich. “We are excited to provide our clients with tailored guidance to help them build and implement a unique philanthropic strategy, and to have Katherine as a dedicated and credentialed philanthropic advisor on staff is a tremendous added value.”

Reegan Rae, CPWA®, managing director of wealth management and firm principal, adds, “Katherine has done outstanding work helping to guide our clients’ charitable efforts. The CAP® designation is a reflection of the commitment, skill, and knowledge she brings to this work. Philanthropic advising is a unique offering that differentiates our approach; our clients are thrilled that we are responding to this deep need and helping them make a more meaningful impact with their charitable giving.”

In January 2019, Arnerich Massena added philanthropic advising as part of its overall service offering to all wealth management clients, with Katherine Fox taking the lead as philanthropic advisor. This added service demonstrates the firm’s commitment to deliver comprehensive services as financial concierge to clients, and addresses an important need for individuals and families seeking to make a difference with their dollars. Interested clients work with the firm’s wealth strategy team in a multi-step process that involves a deep exploration of their goals and objectives and a review of their overall financial picture to evaluate opportunities for tax efficiencies through charitable gifting. The end result is a philanthropic plan that speaks to their passions, offers demonstrable impact they can see, and benefits their long-term tax strategy.

“The CAP® curriculum was a rigorous and in-depth program of study that added to the tools and skills I can offer to our clients,” says Katherine Fox. “Philanthropy done well can be deeply impactful, and I’m passionate about helping people navigate the complexities of the charitable world to enhance the influence of their gifting and change the world.”

More information about Arnerich Massena's philanthropic advising services is available on our website [here](#), and you can listen to philanthropic advisor Katherine Fox introduce and discuss the services in a podcast [here](#). Read Katherine's full biography [here](#).

### **About Arnerich Massena**

Founded in 1991, Arnerich Massena is a Portland-based independent investment advisory firm servicing endowments, foundations, charitable organizations, private clients, trust and estates, and corporate retirement plans. 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, fisheries, 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.arnerichmassena.com](http://www.arnerichmassena.com).