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Arnerich Massena Announces Kathy Peterson has Earned a Chartered Retirement Planning Counselor® Designation

PORTLAND, Ore., March 20, 2017 — Portland-based investment firm Arnerich Massena announced today that consultant Kathy Peterson has earned her Chartered Retirement Planning Counselor® designation. Ms. Peterson serves as a consultant for Arnerich Massena’s institutional group, assisting in the development, execution, and ongoing maintenance of client investment programs. Additionally, Ms. Peterson serves as Arnerich Massena’s education consultant, conducting enrollment workshops, one-on-one retirement planning sessions for participants, and fiduciary education training for committees. The Chartered Retirement Planning Counselor® Designation is directly applicable to her work assisting retirement plan participants in learning how to save and invest for retirement.

In order to earn the Chartered Retirement Planning Counselor® designation, Ms. Peterson completed a course of study encompassing pre- and post-retirement needs, asset management, estate planning, and the entire retirement planning process using models and techniques from real client situations. To earn the designation, individuals must also pass an examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

Terri Schwartz, managing director of institutional services, comments: “We are extremely proud of Kathy’s achievement. This designation is a reflection of the hard work and effort she has put in, and our clients benefit enormously from the experience and knowledge she brings to the table.”

“It’s very important to us to continuously develop the skills and knowledge of our team members, and it’s wonderful when we can celebrate their accomplishments,” says Dave Nute, CEO. “Kathy has dedicated herself to growth that will benefit Arnerich Massena’s clients, and we are excited to acknowledge her achievement.”

About Arnerich Massena

Founded in 1991, Arnerich Massena is a Portland-based independent investment advisory firm servicing corporate pension and profit sharing plans, private clients, endowments, foundations, charitable organizations, 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.