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Arnerich Massena Announces New Service Offering: Philanthropic Advising

PORTLAND, Ore., Jan. 25, 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, announces that the firm has added philanthropic advising to its service model. Philanthropy is a fundamental component of the company's corporate philosophy and vision, and the firm shares this passion with clients by providing guidance tailored to help them build and implement a unique philanthropic strategy.

"While some philanthropists have long-term connections to the non-profit organizations they support, there are plenty of people who have charitable intentions but don't necessarily know where to start. They want to know which organizations are making the most impact, how to make their gifts as tax-efficient as possible, and how to match their giving to their core values," says Katherine Fox, Arnerich Massena's philanthropic advisor. "Whether individuals want to become more educated and involved donors, develop a family legacy, engage with non-profits on the cutting edge of philanthropy, or craft a customized charitable giving plan, we have the resources to help."

Arnerich Massena's wealth strategy team offers philanthropic advising services as part of the firm's overall service offering to all wealth management clients. Interested clients will participate 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.

"We're really excited to make this a part of our service offering," says Glen Goland, JD, CFP, senior wealth strategist. "Philanthropy is close to peoples' hearts, and done well it can be deeply impactful. But it's a complex world out there, and a smart charitable strategy requires understanding the language, researching non-profit organizations, and being aware of tax structures and implications. This process will help our clients make decisions that can greatly enhance the influence of their charitable gifting to change the world."

Reegan Rae, managing director of Wealth Management, adds, "We believe this is a unique offering that differentiates our approach and demonstrates our commitment to deliver comprehensive services as financial concierge to our clients. The reception has been extremely positive; our clients are thrilled that we are responding to this deep need and helping them make a more meaningful impact with their charitable giving."

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](#).

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 pension and profit sharing 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.