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**Arnerich Massena Publishes New White Paper:
*Retirement Plan Best Practices: Plan Governance***

PORTLAND, Ore., November 8, 2016 —[Arnerich Massena Inc.](#), an independent investment advisory firm specializing in retirement plan consulting services, endowment & foundation, private wealth management, and impact investing strategies, has published its latest white paper, *Retirement Plan Best Practices: Plan Governance*. The white paper is the first in a five-part series outlining retirement plan best practices; the series will also cover plan design, menu construction, plan monitoring, and participant education. *Plan Governance* discusses best practice guidelines for setting up documentation and processes to help a retirement plan run smoothly and assist the committee in successfully carrying out their fiduciary responsibilities.

The white paper points out “A fiduciary must exercise a high degree of care with specific legal obligations and duties in terms of prudently managing the plan and its assets.” From plan documentation to committee structure and decision-making, the *Plan Governance* white paper is designed to help plan sponsors meet and demonstrate standards of prudence in their fiduciary responsibilities. A fiduciary checklist at the end can help sponsors stay on track.

“As a partner and co-fiduciary with our clients, we want to provide information to help plan sponsors become better fiduciaries,” says Terri Schwartz, managing director of Institutional Services and Business Development. “Our *Retirement Plan Best Practices* series of white papers will be a helpful guideline across numerous aspects of plan management, and this first one lays out the foundation. It answers common questions like ‘what documents should you have?’ and ‘who should be on the committee?’”

Contributors to the paper include Ryan Cunningham, CAIA; Corrie Oliva, CFA; Jillian Perkins; Terri Schwartz; and Chris Van Dyke, CFA, CAIA.

A downloadable version of *Retirement Plan Best Practices: Plan Governance* is available at <http://www.am-a.com/about/research.htm>.

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.