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

PORTLAND, Ore., Feb. 26, 2018 — Portland-based investment firm Arnerich Massena, 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 Monitoring*. The white paper is the fourth in a five-part series outlining retirement plan best practices; the series began with [plan governance](#), [plan design](#), and [investment menu construction](#), and will conclude by covering participant education. *Plan Monitoring* examines best practices for a retirement plan sponsor in maintaining and monitoring their plan over time.

“Maintaining an employer-sponsored retirement plan is an ongoing process, requiring dedicated attention and oversight,” the paper states. “Monitoring your investment menu managers, your plan providers, and plan fees is an important part of your overall fiduciary responsibility.” The paper guides sponsors in developing monitoring processes based on best practices that will help them fulfill their fiduciary duty while best serving their plan participants.

“Fiduciary liability often comes down to process more than outcome,” notes Terri Schwartz, managing director of institutional services and business development. “Having a thoughtful process in place, then following and documenting the process is the best way plan sponsors can demonstrate prudence. We have years of experience helping retirement plan sponsors monitor their plans and fulfill their fiduciary duties; we’re pleased to share our knowledge and experience in this paper.”

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

A downloadable version of *Retirement Plan Best Practices: Plan Monitoring* is available at <http://arnerichmassena.com/Research-Resources/>.

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.arnerichmassena.com.