

Contact:

Jillian Perkins
Tel. 503.239.0475
jperkins@am-a.com

Arnerich Massena Hosts Charitable Giving Strategies and Estate Planning Forum

PORTLAND, Ore., October 25, 2016 —[Arnerich Massena Inc.](#), an independent investment advisory firm specializing in wealth management services, innovative investment strategies, and retirement plan consulting, announces that the firm will be hosting an upcoming event, “Charitable Giving Strategies and Estate Planning,” a luncheon forum to discuss trends in the world of philanthropy and estate planning. The event will take place at Portland’s Multnomah Athletic Club on Tuesday, November 15 from 11:30 – 1:30 p.m.

The “Charitable Giving Strategies and Estate Planning” forum will be a platform for discussing philanthropic giving strategies, including options for giving, donor expectations in today’s marketplace, how to identify philanthropic causes and initiatives, and the venture philanthropy and impact giving movement. **Ken Weber**, Consultant and Founder of Zynga Foundation, will moderate, and the panel discussion will feature three speakers: **Julia Reed**, Senior Relationship Manager at Schwab Charitable; **Mark Holloway**, Chief Executive Officer and Executive Director of Social Venture Partners; and **Johanna Thoeresz**, Chief Development Officer at Oregon Community Foundation.

“There is a great deal going on in the world of charitable giving,” notes Ryland Moore, Arnerich Massena Business Development Officer and Investment Advisor. “Philanthropists should feel confident that their efforts are having an impact, which requires planning and strategy, just as an investment strategy would. How do you find the right organizations and how do you measure your impact? And as a non-profit organization, how do you demonstrate to your donors the effects of their giving? Finally, how will the outcome of the election affect estate planning?” Moore is looking forward to moderating the panel and generating a lively conversation on these topics.

Tony Arnerich, CEO, says, “We believe this is an important discussion to have, and we’re very excited to host this event. Our esteemed panelists bring a tremendous amount of expertise and knowledge, as well as having a pulse on trends in the world of philanthropy.”

The “Charitable Giving Strategies and Estate Planning” event is open to the public but seating is limited. A recording will also be made available following the event.

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.arnericmassena.com.