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Arnerich Massena Announces New Leadership in Retirement Plan Services

PORTLAND, Ore., June 22, 2015 — Arnerich Massena Inc., an independent investment advisory firm, announced today that it has appointed Jacob O’Shaughnessy, CFA, as senior consultant effective immediately. He has been with Arnerich Massena since 2009 and now assumes strategic leadership for the Retirement Plan Services team, providing oversight of the firm’s services to corporate and public retirement plan clients.

Mr. O’Shaughnessy is a prominent and well-known figure in the retirement plan industry. He is widely recognized as a thought leader and speaks and moderates on a national level. His expertise in the industry reflects a long-term commitment to serving retirement plan sponsors and participants. He is an elected member of the Industry Committee of the National Association of Government Defined Contribution Administrators (NAGDCA).

“Jake brings 15 years of retirement consulting services for public, private, and not-for-profit organizations,” said Tony Arnerich, CEO and CIO. “His unique perspective creates tremendous value for our clients; they benefit from his deep industry knowledge with enhanced plan structures, reasonable fees, and top tier investment lineups. He will provide fresh perspective and expertise to the leadership of the firm’s Retirement Plan Services team.”

“I have always been passionate about helping my clients navigate the industry to do right by their participants,” says Jake O’Shaughnessy, “I’m looking forward to acting in a mentorship role to help develop the next generation of participant and plan sponsor advocates.”

With collectively more than 90 years of experience, Arnerich Massena’s Retirement Plan Services consulting team also includes Howard Biggs; Ryan Cunningham, CAIA; Chris Van Dyke, CFA, CAIA; Luka Arnerich; Stuart Payment; and Kathy Peterson. As a core focus of Arnerich Massena, the firm is dedicated to continued investment in a robust Retirement Plan Services division. This new leadership structure reflects Arnerich Massena’s ongoing commitment to provide the firm’s clients with independent, unbiased advice and exceptional service.

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.