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Arnerich Massena Announces New Principal Terri Schwartz

PORTLAND, Ore., February 6, 2017 — Portland-based investment firm Arnerich Massena announced today that Terri Schwartz has joined the shareholders of the firm. On January 9, 2017, the firm announced its transition to 100% employee ownership; a group of senior employees now share equity ownership of the firm. Ms. Schwartz, managing director of institutional services and business development, is a member of this shareholder group and will also now serve on the firm's Board of Directors.

Terri Schwartz initially worked with Arnerich Massena during its founding years. She now provides oversight of the firm's institutional services division, including services to corporate retirement plans and non-profit clients. Ms. Schwartz has 30 years of industry experience, having previously served as director of Consultant Relations for Cutwater Asset Management, a BNY Mellon company, and as a financial consultant/principal and director of client relations at Northwest Capital Management. Ms. Schwartz is a member and mentor with Portland's Women in Investment Management, a group that she co-founded. She also serves as a board member of the Portland American Cancer Society, which works to fight back against cancer.

Terri is looking forward to the future of Arnerich Massena and her role as principal: "After 30 years in this industry, I can say with confidence that we have an exceptional team and an outstanding service model. I am very excited about our future."

Dave Nute, CEO, said "We are very fortunate to have Terri as a partner. Her experience, industry acumen, and wealth of knowledge will be invaluable in guiding this firm into the future and continuing to grow our institutional practice." He notes, "Our firm has a history of outperformance and innovation, and Terri is well poised to help continue our legacy."

Founder Tony Arnerich, who has known Terri since they started working together nearly 30 years ago, has complete confidence in her. "I am proud to have Terri as a partner!" he said. "Terri knows this industry thoroughly. We are lucky to have her helping to guide the firm."

The recent management buyout of the firm will allow the 25-year-old investment firm to retain its independence, maintain the highest level of client service, and continue to provide forward-looking investment advice.

About Arnerich Massena

Founded in 1991, Arnerich Massena is a Portland-based independent investment advisory firm servicing private clients, endowments, foundations, charitable organizations, trusts 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, 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.

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