

Celebrating 30 years of building lasting legacies to serve a greater good

1991

Founded in 1991

Founded by two women and one man, the vision was to establish an independent and unbiased investment firm with a dedicated focus on quality research and client service.

1995:

We believe in doing good.

Arnerich Massena launches the *I AM Learning Partnership*, an award-winning community service program focused on literacy and mentorship.

2008:

Sustainability visionaries

Arnerich Massena's first research paper on sustainable investing was published in 2008 after years of research, well ahead of the trend.

2016:

Growing our service model

Arnerich Massena begins providing comprehensive family office and wealth planning services

2018:

Helping you give

Arnerich Massena launches philanthropic advising as a service available to all clients, with a dedicated philanthropic advisor.

2019:

Becoming a B Corp®

Arnerich Massena becomes a Registered B Corporation®, joining a global movement of people using business as a force for good.

2021:

Co-CEO team

Reegan Rae, CPWA®, and Bryan Shipley, CFA, CAIA, take the reins as a Co-CEO team to lead the firm into the next 30 years.

2021

1992:

Alternative pioneers

We started investing in alternatives and private markets in 1992, building our expertise and connections.

1997:

Global investors

We recognized the importance of global investing in 1997 and began constructing global portfolios.

2012:

Empowering investors

Arnerich Massena shares its thinking and research with you via hosted events, MarketCasts, and white papers. Eventually, we add a blog, webinars, and podcasts.

2017-2020:

Successful succession

In 2017, Arnerich Massena became 100% employee-owned through a management buyout. Since that time, the firm has transitioned to a new generation of leadership driving us into the future.

2018:

Making an impact

In 2018, after ten years of in-depth research, we formally launched our impact portfolios, committed to helping clients do well and do good at the same time.

2019:

Intentional investors

Arnerich Massena signs the UN-supported Principles for Responsible Investment and joins the Intentional Endowment Network.

2021:

A new home

Arnerich Massena moves into a new state-of-the-art facility in the Liberty Centre.