A retirement plan backed by trust and knowledge

THE PARTNERS GROUP

Here for you, every step of the way

Think of us as an extension of your staff — here to make life easier.

Let's look at your goals, the potential financial impact to your bottom-line and how to best serve you and your employees.

Elevate your retirement plan

A comprehensive approach to you plan improves employee engagement and retirement outcomes. With us, you'll get outside-the-box thinking and a strategic perspective. Our services include:

Plan design + Fiduciary oversight + Employee education + Investment management

You care about your employees

Get a key resource in creating a vision for the financial future of you and your employees. Here's how we'll help the different areas of your organization:

Financial
Assist with fiduciary responsibilities, compliance & investments

+

Human Resources
Make the most of your time to best support employees

+

Employees
Instill confidence & skills for successful retirement

Your retirement education

Retirement plans can be complicated, but you don't have to know all the ins-and-outs yourself. We'll focus on education by:

- Conducting employee education and services
- Better aligning you and your employees for financial wellness
- Simplifying the complexity of your fiduciary duty

88%

of workers believe their employer should provide assistance to save for retirement[1]

and

82%

of workers lack confidence they can live comfortably throughout their retirement years [2]

You can help your employees!

Call us today!

503-241-9550

Your dedicated retirement team

Our approach to consulting can be expressed in two words: listen and deliver. We'll listen to your needs and concerns, then deliver results that exceed your expectations.

Get a knowledgeable team that is down-to-earth and approachable. We look forward to getting to know you, your organization and your employees.

Ready to take the next step?

Contact us today!

503-241-9550

Nicole Pond, CBFA, AIF®, CPFA

Managing Consultant, Retirement Plans Partner

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Nicole brings 13 years of financial service experience to the team; seven of them spent working with corporate retirement plan clients for a global financial services company. In 2016, she started managing the retirement department and became a partner in the firm.

She earned a degree in business administration from the University of Oregon. She enjoys camping, cooking, and traveling with her husband.

- Awarded National Association of Plan Advisors — (NAPA) Top Women Advisor[3]
- Nominated for NAPA's 2015 Top 50 Under 40
- Holds series 7 and 66 securities licenses

Emily Roselle, CRPS®

Account Manager, Retirement Plans

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Emily is the main point of contact for client and participant requests. She assists with plan design, benchmarking, plan transitions and implementation, and operational and participant questions. Emily has been a member of our retirement team for 10 years.

She earned a degree in biology from the University of Oregon. Emily enjoys camping, working on home improvement projects, and adventures with her husband and son.

- Holds series 7 and 66 securities licenses

Adriana Roman

Administrative Coordinator, Retirement Plans

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Adriana's focus is on the day-to-day internal operations and serves as support to the team and our clients. She has over 20 years of experience in the financial industry.

She enjoys traveling with her husband and two children, cooking and spending time with her family.

A[1]light Solutions, Hot Topics in Retirement, 1/2018
[2]EBRI Greenwald Retirement Confidence Survey, 3/2017
[3]National Association of Plan Advisors (NAPA), 10/2015