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NEWS RELEASE

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SAGEVIEW ADVISORY GROUP ACQUIRES REMAINING RETIREMENT PLAN BUSINESS FROM ARNERICH MASSENA

Arnerich Massena Senior Consultant to join SageView team as part of transition

NEWPORT BEACH, California (March 29, 2021) – SageView Advisory Group has acquired the retirement plan services practice of Arnerich Massena, the firm announced today. As part of this transition, Luka Arnerich, CAIA, will join the SageView team as a Retirement Plan Consultant in Portland, Oregon.

Arnerich spent eight years at Arnerich Massena, an independent investment firm based in Portland, Oregon, serving institutional clients with portfolio management, investment policy development, investment menu design, governance support and fiduciary education. His expertise extends from defined contribution, defined benefit and deferred compensation plans to consulting on endowments and foundations.

“This is exciting news for SageView and Arnerich Massena, allowing both firms to continue to focus on our core competencies,” said Randy Long, SageView Founder and CEO. “SageView’s growth since inception has been driven by our dedication to the retirement industry and Luka will make an excellent addition to the team. Furthermore, Luka’s commitment to making an impact on his community aligns with our passion to help those in need through the SageView Foundation. We look forward to working together.”

SageView previously acquired a significant portion of the Arnerich Massena participant-driven retirement plan services practice when Howard Biggs, Jacob O’Shaughnessy, and Stuart Payment joined the firm in 2016.

“As Arnerich Massena shifts our focus exclusively toward private wealth management and endowments and foundations, we are confident that SageView is the right choice for transitioning our remaining retirement business,” said Bryan Shipley, Co-CEO and CIO of Arnerich Massena. “After transitioning much of our retirement plan business to SageView in 2016, we know our clients will continue to be in great hands. We are confident this decision is in the best interests of our clients and our firm and we look forward to supporting our clients through this transition as necessary.”

Arnerich Massena’s remaining retirement plan services practice primarily consists of defined contribution, defined benefit, and deferred compensation retirement plans. These services highlight SageView’s dedication to the retirement industry and align with the continued commitment to helping the community.

About SageView Advisory Group

SageView Advisory Group is an SEC Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans. SageView is headquartered in Newport Beach, California with 25 offices nationwide.

SageView Advisory Group, LLC is a Registered Investment Advisor. Advisory services are only offered to clients or prospective clients where SageView Advisory Group, LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future results. No advice may be rendered by SageView Advisory Group, LLC unless a client service agreement is in place.

For more information about SageView, visit www.sageviewadvisory.com or call (800) 814-8742.

About Arnerich Massena

Arnerich Massena is an independent investment firm based in Portland, Oregon. Dedicated to building lasting legacies to serve a higher good for its clients, the company has been around for three decades. With a focus on serving wealth management clients and endowments & foundations, the firm is distinguished by its exceptional client service, unbiased, proprietary research, and a long history of providing creative, high-quality investment advice.