

# 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 your 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<sup>1</sup>

and

**83%**

of workers lack confidence they can live comfortably throughout their retirement years<sup>2</sup>

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, Shareholder*

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.

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- Awarded National Association of Plan Advisors – (NAPA) Top Women Advisor
- Nominated for NAPA's 2015 Top 50 Under 40
- Holds series 66 securities licenses



### **Kent Smothers**

#### *Consultant, Retirement Plans*

Kent has designed and implemented retirement plan strategies for over 20 years. Before joining The Partners Group, Kent was employed as a Vice President of Sales with a Fortune 500 retirement plan company. His collaborative approach to working with clients to help improve business performance is a cornerstone of his career.

Kent enjoys spending time with his wife, two children, four grandchildren, and hosting food and fun whenever possible.

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### **Emily Roselle, CRPS®**

#### *Account Manager, Retirement Plans*

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 over 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 two children.

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### **Adriana Roman**

#### *Administrative Coordinator, Retirement Plans*

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.

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<sup>1</sup>Alight Solutions, Hot Topics in Retirement, 1/2018

<sup>2</sup>EBRI Greenwald Retirement Confidence Survey, 4/2018

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