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ENCOMPASS WEALTH ADVISORS LAUNCHES

Seasoned Wealth Management Team Leverages Independent Advisor Model to Deliver Comprehensive, Client-Centric Suite of Investment Options and Services

PORTLAND, ORE. — July 15, 2014 — Encompass Wealth Advisors launches today in Portland, Oregon, as a registered investment advisor (RIA) dedicated to delivering comprehensive, client-centric wealth management strategies. The Encompass team, comprised of Derrick J. Clouser, Walter M. Urban, Matthew G. Presjak, Colin H. Williams, and Mary Minshall, has been working together at Morgan Stanley in Portland, Oregon since 2001. With over 125 years of combined experience, the team advises to $650 million in assets under management.

Encompass provides clients with a holistic and customized suite of financial services, including retirement and estate planning; structuring and managing investment portfolios; education planning; charitable giving strategies; business planning; insurance portfolio management; and home finance and lending services. In addition, the team has special expertise in implementing business successions plans for sole practitioner financial advisors, helping them to build a better business and gracefully navigate the last part of their careers.

"We are very pleased to be launching Encompass Wealth Advisors at a time when many of the nation's best advisors and teams are leaving traditional wirehouses to establish independent practices," said Colin Williams.

"It was once true that only an advisor at a big firm could access the world-class resources needed to deliver comprehensive wealth management. Today, we can hand-pick the best tools and resources in an open-architecture environment. Additionally, by taking on the fiduciary standard, clients can know beyond a shadow of a doubt that any advice we offer is totally objective and unbiased," said Matt Presjak.

Building upon the depth and breadth of its experience, Encompass undertakes a thorough review of each client's unique circumstances and goals, utilizing a four-step discovery and implementation process. The team begins by thoroughly evaluating the client's current financial resources and discussing desired outcomes. Next, they map out a custom strategy to achieve the client's future goals and address present needs. The strategy is implemented with the selection of appropriate investment solutions for building and strengthening the client's portfolio. Once the plan is in place, the Encompass advisors continually monitor, review and report on the progress made in meeting the client's needs and goals.

Mr. Clouser, RIA Principal, has extensive experience in coordinating the implementation of strategies for clients by working with their other advisors, including accountants and attorneys. Mr. Urban, RIA Principal, has focused his efforts on understanding and meeting the needs of successful business owners and affluent multi-generational families. With over 25 years of industry experience, Mr. Presjak, RIA Principal, has provided clients with guidance for financial and estate planning, as well as investment management counsel. Mr. Williams, RIA Principal, concentrates on portfolio construction and on collaborating with clients' accountant and attorneys to implement their financial plans, with Ms. Minshall providing comprehensive support as Executive Director.

Encompass Wealth Advisors partnered in its launch with tru Independence, a consulting firm for financial professionals looking to work with a best-in-class integrated service platform designed to guide and provide them with the resources needed to transition to being independent wealth advisors. Encompass will leverage tru's state-of-the-art capabilities, including technology, managed investments, institutional research, trust and insurance services and credit facilities. Fidelity Institutional Wealth Services will provide custody services and Envestnet will provide portfolio trading tools and reporting.

"The Encompass team is fully committed to developing long-term relationships of trust with investors by providing them with the impeccable service, transparent practices and objective advice they need and deserve," said Mr. Clouser. "As independent advisors, we now have the ability to deliver this exceptional level of service through tru Independence's fully integrated platform that allows us to provide holistic investment options and counsel, "said Mr. Urban.

For media inquiries, please contact Kris Kagel at 973-850-7312 or kkagel@jcprinc.com.

<u>About Encompass Wealth Advisors</u>
Encompass Wealth Advisors is a registered investment advisor (RIA) firm based in Portland, Oregon, that is dedicated to providing comprehensive, objective and transparent investment options and advice so that clients can successfully address their currents needs and achieve their goals for the future.

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