

“Our people make us great.”



Tim Phillips

Chief Executive Officer

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EXPERIENCE

A recognized leader in the area of wealth management, Tim Phillips previously served as board chairman for the Willamette Family of Funds, which raised over \$500 million in assets. But it is at Phillips and Company where Tim has made the biggest impact. With over 2,000 clients nationwide, it has quickly become one of the largest locally-owned wealth management firms in Oregon and one of the Top 150 independent Investment Advisors in America. Phillips and Company has been recognized for their unique 401(k) engagement model, which was highlighted in several publications.

RESPECT

Tim ran for Congress in 2004 and was also appointed by the Governor of Oregon to help manage a fund that makes venture capital and private equity investments on behalf of the State. He also has been quoted in The Chronicle of Philanthropy, Private Wealth Magazine, Wealth Manager Magazine, and on MSN Money as an expert in wealth management. In 2008, he was named by Worth magazine as one of the Top 250 Wealth Advisors in America. Tim is also certified as an Accredited Investment Fiduciary (AIF).

COMMUNITY INVOLVEMENT

Tim served as the board chairman of the Children's Cancer Association and is the current Chairman of the Foundation Board. CCA provides innovative music therapy to children facing life-threatening illness throughout the country. He is a member of the Associated Oregon Industries board which focuses on strengthening the Oregon economy and issues facing Oregon businesses. He is also a Regent at Pepperdine University and serves on their endowment committee, as well as, chairs the Advancement and Public Affairs Committee. He was the Vice Chair of the recently completed Campaign for Pepperdine.

As an enthusiastic advocate for community involvement, Tim has encouraged volunteerism within his company. He encourages employees to volunteer with their favorite organizations and directs the company to support such causes as Elevate Oregon, JOIN, Portland Art Museum, CCA, OHSU Foundation, and Randall Children's Hospital.

PERSPECTIVE

Tim has earned a reputation for having a diverse perspective on wealth management and for utilizing his experience to create a competitive advantage for his clients.

Combine Tim's experience, respect, community involvement and perspective with a thoughtful, measured approach to problem solving and refined leadership qualities and you have the ideal executive for a company that delivers in both face-to-face relationships and high-capital investments.