

“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 thousands of clients nationwide including family offices and corporate pensions, it has quickly become one of the largest locally-owned wealth management firms in Oregon. Phillips and Company has also been recognized for their unique 401(k) engagement model. Tim leads the firm with a focus on it's culture and mission. Improving lives is the guiding principle Tim is committed to upholding in all he does.

RESPECT

Tim ran for Congress in 2004 and was appointed by the Governor of Oregon to help manage a fund that makes venture capital and private equity investments on behalf of the State.

COMMUNITY INVOLVEMENT

Tim served as the board chairman of the Children's Cancer Association, Leukemia and Lymphoma Society of Oregon, and Associated Oregon Industries as a board member. He currently serves on the board of Hostage US, an organization tasked with supporting hostages and their families. He is also a Former Regent of Pepperdine University.

As an enthusiastic advocate for community involvement, Tim encourages volunteerism within his company. He has inspired employees to support such causes as Oregon Wild, Oregon Sports Authority, Oregon Historical Society, and Randall Children's Hospital as well as volunteerism with their favorite organizations and causes.

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.