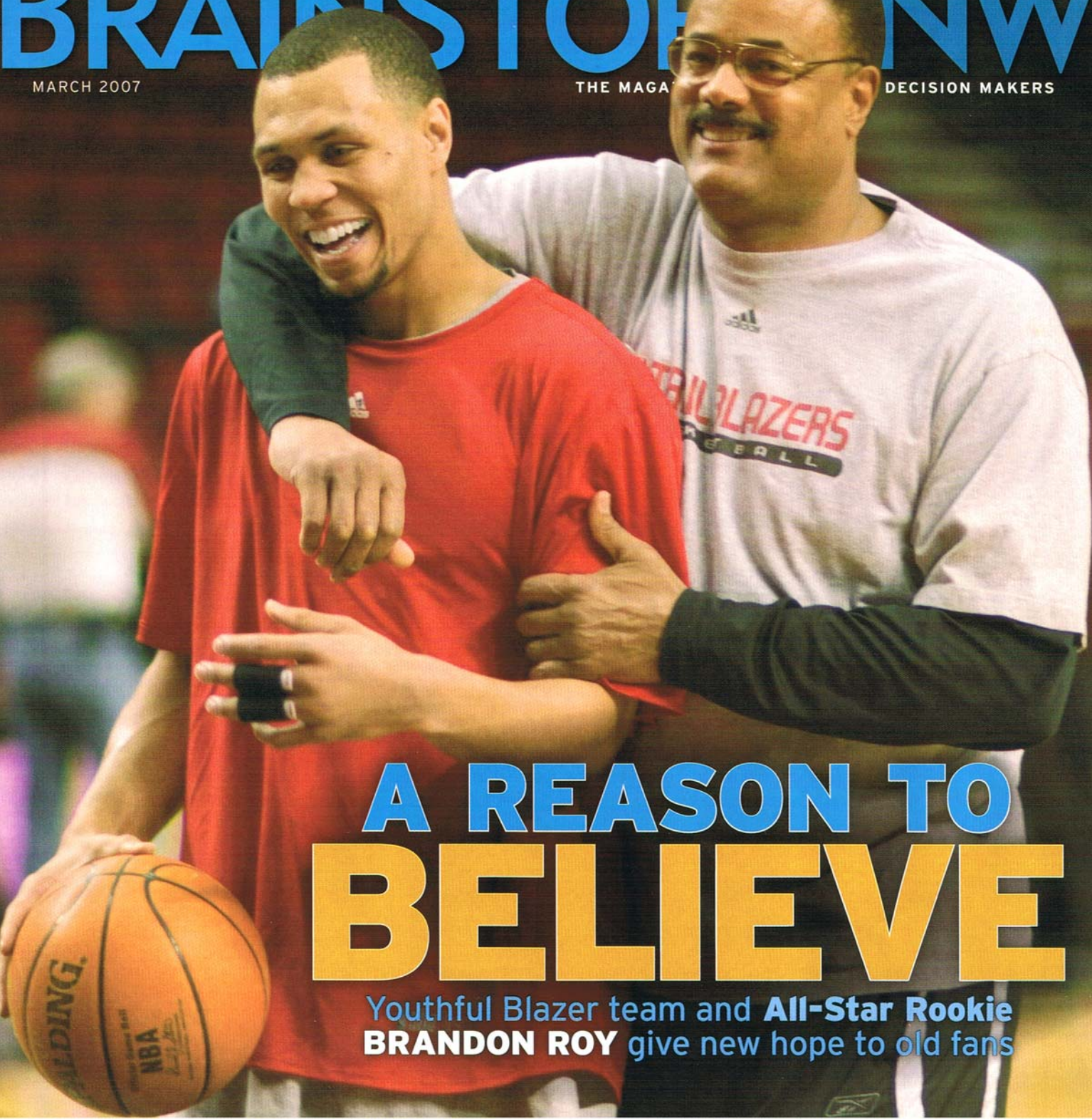


# BRAINSTORM NW

MARCH 2007

THE MAGAZINE

DECISION MAKERS



## A REASON TO BELIEVE

Youthful Blazer team and **All-Star Rookie**  
**BRANDON ROY** give new hope to old fans

EVERY YEAR, THE **BRAINSTORMNW**  
**TOP FINANCIAL ADVISORS** ARE NOMI-  
NATED AND RECOGNIZED BY THEIR  
PEERS AS THE BEST IN THEIR FIELD.  
BNW REWARDS OREGON'S FINEST  
FINANCIAL ADVISORS AND ANALYSTS  
WITH THE OPPORTUNITY TO DISCUSS  
THEIR PERSONAL APPROACH TO THE  
BUSINESS OF INVESTING. WE ASKED  
THIS YEAR'S TOP ADVISORS THREE  
IMPORTANT QUESTIONS — QUESTIONS  
THAT MIGHT HELP YOU DECIDE ON A  
STRATEGY FOR FINANCIAL SUCCESS  
AND MIGHT HELP YOU DECIDE ON A  
FINANCIAL ADVISOR TO SERVE YOUR  
NEEDS. HERE'S WHAT THEY HAD TO SAY.

**William A. Harris,**

*Allen Capital Management*

“One of our semi-retired clients, though quite wealthy by most any measure, had fixated on a specific portfolio yield, which in previous periods had been easily obtainable but in the then-current environment would demand considerable contortion to maintain. He was agitating for a significant shift in his basic asset allocation, which would have resulted in both a reduction of his asset base and a more vulnerable, less diversified portfolio. The first

thing we did was acknowledge the legitimacy of his desire; though he didn't truly need the additional income to maintain his lifestyle, the psychological comfort it promised him was of real value. The second thing we did was explore what experiences or inclinations led him to fix on the current income as the yardstick by which he measured peace of mind. It turned out that, among other things, there were some intense family dynamics underlying the matter. Knowing the background

**Stuart B. Allen,** *Allen Trust Company*

“Many clients come to us because they have made some regrettable investment-related decision or realize they don't have the time or expertise to manage their own money. Giving us discretion to invest on their behalf can free them to enjoy the more truly enriching or fulfilling non-financial parts of life. In recent years, clients are more interested in trusts. Trusts have great tax, legal and legacy aspects but can be very complicated. There are some institutions pitching trusts that either don't understand them or don't fully disclose the fees associated with them or their potential conflict of interests. As a trust and investment fiduciary, we help steer them through the complexities with expertise and in a manner that represents their interests first and foremost.”

enabled us to come up with an alternative approach that 1) would have a less deleterious tax impact, 2) satisfy his hunger for cash flow, 3) maintain a diversified portfolio promising to be more robust across a variety of market environments, and 4) still work toward the portfolio's secondary goals of growth in principal and future income streams.”