



## Our People

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We are committed to maintaining the highest standard of integrity and professionalism in our relationship with you, our client. We endeavor to know and understand your financial situation and provide you with only the highest quality information, services, and products to help you reach your goals.

As we assist you with your company-sponsored retirement plan, you will interact with many from our great staff.

### **Duane Bolinger, CFP®, Retirement Plan Advisor**



Duane graduated from Portland State University in 1997 with a Bachelor of Science degree in Economics. He began his career in the financial service industry in 2007 with Beneficial Financial Group. In 2009, he joined Cory Smith and together they have built one of the premier partnerships focused on helping employees utilize their company-sponsored retirement plan to reach their financial goals. Duane primarily focuses on assisting owners/plan sponsors with selecting, reviewing, and evaluating various plan design options and service providers.

### **Brittany Decker, Relationship Manager**



Brittany has worked in the customer service field since 2008. Her previous training and education have made her a valuable asset to the companies that we serve. Brittany is instrumental in helping owners/plan sponsors execute their company education plan. She coordinates education workshops, plan sponsor meetings, and employee service requests.

### **Monica Sanchez, Relationship Manager**



Monica has several years of experience in customer service. She is adept at handling a variety of complicated situations. She is currently working towards her Associates Degree at Portland Community College. Monica assists with scheduling individual employee meetings and helping employees with their service requests.

## ALLEGIS RETIREMENT

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