

For Immediate Release

Contact: Michael O'Reilly,
Co-Founder, Vista Capital Partners
503-772-9600; michael@vistacp.com

Vista Capital Partners' Assets Rise to Record \$1 Billion

Relationship-Oriented Approach Brings Rare Industry Accolade

Portland, OR (July 20, 2016) – Vista Capital Partners (Vista) announced today it has surpassed \$1 billion in assets under management (AUM), crediting its success to steady growth driven by client and professional referrals. References highlight one of the group's noteworthy differentiators — each client is served by a team of three people (lead advisor, portfolio manager and client service administrator) rather than the industry standard of only one advisor.

“The trust and support of clients has been vital,” explains Michael O'Reilly, co-founder of Vista Capital Partners. “Reaching \$1 billion in assets reflects not only the strength of our investment philosophy, but the loyalty of our clients. When you take great care of clients, they refer their friends and family, which is the ultimate validation of the work we do.”

The firm, started 15 years ago with three people, 50 clients and \$30 million under management, has become a prominent force in Portland and throughout the Northwest. Today, the company advises close to 400 clients and manages more than \$1 billion in assets. Additionally, it employs 19, including seven partners who have all been promoted from within.

“When Vista started in 2001, we hoped, but could never have imagined, what the firm would become,” says Doug Johanson, CEO and co-founder. “Attracting and retaining bright and talented staff over the years has allowed us to scale our business in order to accommodate additional clients and still maintain a low client per professional ratio.”

A Measured Approach

The firm's strategic approach to deliberate, thoughtful growth has aided its \$1 billion milestone. “We have a game plan for growing our business, just like we have a game plan for growing our clients' portfolios,” says O'Reilly. “In addition to our commitment to relationships, our passion and unwavering discipline have been a major component to our success thus far.”

The firm has grown organically in a deliberate and measured way, stemming neither from acquisitions or mergers, nor from new employees with large client lists. Vista was one of the first investment firms in Portland to favor low-cost index funds for their clients. The firm

incrementally raised its minimum investment for new clients over time from \$250K to its current \$2M.

Company Culture as an Asset

At the heart of Vista's methodology is customized financial planning, a Nobel-prize winning investment approach to asset management and an unyielding commitment to its clients' best interests. "Our firm's core purpose and culture revolve around building happier and more prosperous lives, both for our clients and our employees," adds Johanson.

About Vista Capital Partners

Vista Capital Partners is a wealth management firm based in Portland, Oregon. Vista utilizes thoughtful planning and optimal portfolio management to protect and grow their clients' assets giving them their best chance for success. What started in 2001 as a team of three has grown to a dedicated staff of nearly 20 with more than \$1 billion in assets under management.

Contact information: Vista Capital Partners, 9755 SW Barnes Rd, Suite 595, Portland, OR 97225, and phone (503) 772-9500. www.vistacp.com

###