

# Outlook: Pacific Northwest Business Profiles

Since the days of the Klondike Gold Rush, the Pacific Northwest has been a place of high hopes and innovative ideas. Seattle, Portland and their neighbors are likely to maintain a place of commercial and cultural influence for many years to come.



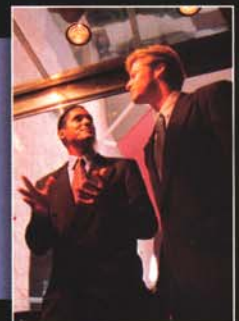
High tech industries such as aerospace, electronics, telemedicine, genomics and environmental engineering play a pivotal role in the Pacific Northwest economy. And such pioneering businesses require the expertise of creative, seasoned professionals in accounting, law, financial consulting and many other fields. Professionals in the region have risen to the challenge, offering world-class services for both large and small businesses.

On the following pages, you will read about some of the current and future business leaders who are helping the Pacific Northwest capitalize on its many assets.

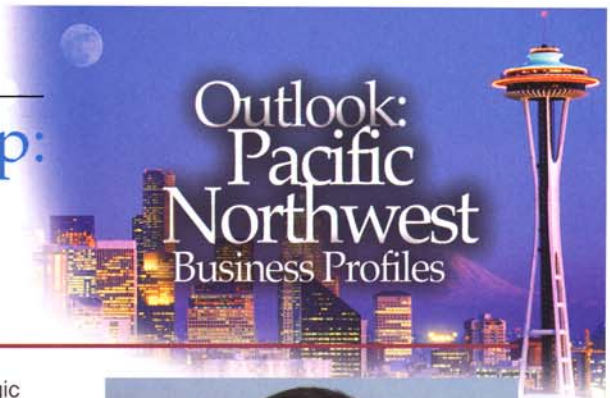
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# The Business Planning Group: A 'Firm of Firms' Straightforward Comprehensive Financial Services



People are the lifeblood of any business, especially small and medium-sized companies, where changes in key personnel can profoundly impact day-to-day operations and long-term success. "Effective recruitment, retention and retirement strategies require experts in several key financial disciplines," says A. Lee Hoch, president and CEO of the Business Planning Group, Seattle.

"Whatever the need, our 'firm of firms' structure enables us to bring to the table specialists who know exactly what is needed in a given situation," Hoch says. "Our clients benefit from the extensive collective expertise we provide while managing ongoing changes to their financial plans."

The Business Planning Group provides "boardroom level" services through its "firm of firms" approach, which allows access to a variety of services through one source. Specializing in corporate-owned life insurance (COLI) and other corporate risk management programs, this team of experts is equally proficient in the areas of investment advisory services and income and estate tax planning.

Says Hoch, "Through a strategic alliance with Tacoma-based Russell Investment Group, which guides \$2.3 trillion in assets worldwide, clients have access to an investment process generally available only to very large institutions with many millions to invest. Also, specifically tailored corporate-owned life insurance programs underwritten by top-rated companies like Pacific Life allow these same clients with executive populations as few as five to stand shoulder-to-shoulder with giant enterprises like General Motors, Boeing and Microsoft."

Estate planning with sensitivity to the impact on people is another cornerstone of the Business Planning Group. "Over and above technical financial concerns – such as minimizing income taxes and expenses – estate planning must take into account the needs and concerns of the individuals who will be affected by the movement of assets," Hoch explains.

Business Planning Group clients enjoy ready access to their investments and to the expertise of the strategic partners via interactive web-based platforms. "Portfolio interconnectivity funnels seamlessly through *fsic*, a regional broker/dealer headquartered here in Seattle," Hoch says. "The advantages of having all business and personal investments, including corporate-funded key-person and insurance plans, in one place and available for review at a time of the client's choosing cannot be overstated."

"When an executive retires and someone new comes aboard, the company's financial services and strategies must adapt accordingly. By integrating human resources strategies into this mix, we can help a business make the



A. Lee Hoch, president and CEO of the Business Planning Group, spent four years in the United States Marine Corps. He then attended Yale University, graduating in 1976 with a BA in economics. He continued his education at University of Pennsylvania's Wharton School of Business, earning an MBA in 1978. He also earned a Master of Science degree in financial services (MSFS) in 1996 from the American College in Bryn Mawr, Pa. Hoch has more than 20 years' experience specializing in the corporate arena of the financial services industry.

best personnel decisions during these times of change."

At the end of the day, the team of talented strategists in the Business Planning Group and its strategic partners offers small-to-medium sized businesses integrated financial strategies through a wealth of technical expertise, an impressive breadth of experience and effective technological solutions. Says Hoch, "Our job one is our clients' success."

If you're looking for straightforward comprehensive financial services, call or visit the website today.



The Business Planning Group  
left to right: Lee Hoch, Candy Lee,  
Andy Schmidt, Neil Larson

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