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Aligning Values, Vision & Wealth von Borstel & Associates

During the recent plunges in financial markets worldwide, many people were rudely reminded of how risky investing can be. The unpredictability of stocks and the emotional roller coaster of short-term investing have many people reexamining their approach to money.

"A portfolio that is good for the long term may underperform against the market in the short term," says Wayne von Borstel, founder and president of Oregon Trail Financial Services, a registered investment firm with offices in Portland and The Dalles, Oregon. "Investors need an objective coach to help them stay focused on long-term strategies that are appropriate for them. People have a choice about whether to follow the prevailing winds of financial opinion or stick to a realistic plan."

To help clients create the most rewarding financial lives possible, von Borstel & Associates constructs individualized plans based on each client's goals and values. The firm's investing process begins with a thorough assessment of what wealth means for the client. What are their personal priorities — family, faith, health, career — that need to be considered in the plan.

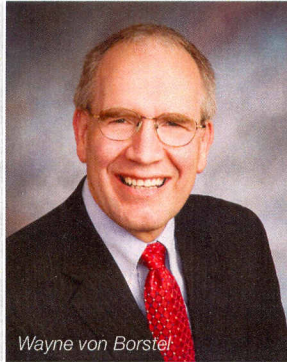
"Doesn't it make sense that I know my clients better than anyone?" von Borstel says. "I need to understand how they see their purpose in life and how wealth can help them achieve their goals."

Clients' needs and the financial climate are bound to change over time, so von Borstel & Associates keeps a vigilant eye on each client's portfolio and adjusts investments as necessary. The firm combines a dedicated, qualified team of on-site professionals and state-of-the-art technology to monitor investments and give clients access to their accounts through a single, secure platform. They also provide access to a network of attorneys, accountants and insurance specialists.

Dedicated to Client Success

"Financial planning isn't just a job for me," von Borstel says. "My clients are my life's work and my hobby. I truly enjoy creating plans that guide my clients to make more informed and focused decisions about their financial lives."

He is quick to point out that financial planning is very serious business. "I have an obligation to be honest and straightforward with my clients," von Borstel says. "Simply telling clients what they want to hear will get them nowhere. Sometimes I have to be the bearer of bad news. But being forthright benefits clients in the long term. They can trust my staff and me to be objective and realistic."



Wayne von Borstel

Since 1985, von Borstel has been analyzing the financial situations of wealthy families and professionals; positioning their assets to help them live better, worry less and leave more to their heirs. von Borstel feels honored to have been consistently recognized over the past years by numerous national sources. The *Portland Business Journal* recognized von Borstel as one of the NABCAP (National Association Board of Certified Advisory Practices) Premier Advisors in the Portland area. In 2009, he was among *Barron's* "Top 1,000 Advisers" in the nation and 5th in Oregon. In 2008, the *Portland Business Journal* ranked him as one of the top two advisors in the Portland/Metro area. *Research* magazine's 2006 supplement "The Winner's Circle" included him among its top-ranked advisors in America. *Mutual Funds* magazine has twice named von Borstel one of the "Top 100 Planning Champions" in the U.S. Typically, customer satisfaction and client retention play a role in determining these rankings, but please feel free to contact von Borstel & Associates for a reprint or a summary of the selection criteria used in determining any of these distinctions.



The von Borstel team

For more information, visit www.vonborstel.com or call 800-600-6669. Wayne von Borstel, CLU, ChFC, CFP®, MSFS is a registered representative with and securities offered through LPL Financial. Member FINRA/SIPC.

VON BORSTEL
& ASSOCIATES
ALIGNING VALUES, VISION AND WEALTH™

The Dalles Office: 308 East Third Street | The Dalles, OR 97058 | 541.296.6669
Portland Office: 9955 SE Washington, Suite 105 | Portland, OR 97216 | 503.257.6969
www.vonborstel.com