

## BUSINESS RESOURCE CHECKLIST FOR GROUP CLIENTS

- Auto and Homeowner's Insurance / Business liability/Worker's Comp:  
Dave Snyder with American Family Insurance  
15220 NW Laidlaw Road, Ste. 220, Portland, OR 97229  
(503) 466-2225 [DSNYDE2@AmFam.com](mailto:DSNYDE2@AmFam.com)
- Tax Services: Do you work with a CPA? Susan Hjort, Ohanesian CPA  
9011 SW Beaverton-Hillsdale Hwy, #1C, Portland OR 97225  
503-520-1382 [sueh@oacpas.com](mailto:sueh@oacpas.com)
- 401(k) plan services Fiduciary: Chris Goetz  
CFG Wealth Management  
503-222-7100 <http://www.cfgwealth.com/>
- Business Attorney: Scott Schnuck, Attorney  
Altus Law  
<http://www.altuslaw.co/>  
503- 374-1913 (Direct) [sschnuck@altuslaw.co](mailto:sschnuck@altuslaw.co)
- Supplemental Products: Jason Rump, Family Heritage Group  
Cell: 503-516-4794  
Office: 440-922-5222  
[jason@northernstarsfinancial.com](mailto:jason@northernstarsfinancial.com)
- Payroll Services: Misty Martin-Zimmerman, Paychex  
7650 SW Beveland Street, Ste. 200, Tigard, OR 97223  
971-678-4443 [mmartinz@paychex.com](mailto:mmartinz@paychex.com)