

# OneDigital Expands its Portland Presence with Two Acquisitions

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## **Impact Benefits & Retirement and Strategic Employee Benefit Services of Oregon Join OneDigital**

Atlanta, GA – May 26, 2021 – OneDigital, the nation's leading strategic advisory firm focused on delivering health, retirement/wealth, and HR solutions for employers of all sizes, has acquired Impact Benefits & Retirement and Strategic Employee Benefit Services of Oregon (“SEBS of Oregon”).

The addition of the two Portland-based organizations demonstrates OneDigital’s growth momentum in the Oregon market. Both Impact Benefits & Retirement and SEBS of Oregon provide a competitive advantage with their respective service offerings that broaden the firm’s scope. The joint partnership significantly increases the total number of individuals and businesses receiving the strategic workforce strategy solutions throughout OneDigital’s Pacific region.



*I am delighted to welcome not one but two teams to OneDigital in Portland, Oregon. Over the past year, we were having simultaneous conversations with Impact Benefits & Retirement and Strategic Employee Benefits Services, a division of Northwestern Mutual. From my initial conversations, I was incredibly impressed with both firms' holistic approach to designing and supporting robust company employee benefits and retirement programs. Additionally, it was abundantly clear that they are both "People First" firms. Both in terms of their commitment to their employees, as well as the clients they serve. It was a perfect match with OneDigital's culture. Under the leadership of Candy Dietz and Mary Caballero, who have led Impact for many years, I am extremely excited to work closely with them to develop and grow the Portland market.*

*— Jeff Fallick, Regional Managing Principal, OneDigital Pacific Region*

Since its founding, Impact Benefits & Retirement has trailblazed the market as a woman-owned and operated firm specializing in integrating retirement services, group health insurance, and wealth management advisory. The firm's streamlined business model empowers companies to achieve their financial and benefits goals while prioritizing the total-wellbeing of their employees.

"Impact Benefits & Retirement is proud to be taking the next step towards bringing its clients a full range of resources that will strengthen our legacy as a premier partner providing local boutique services," said Mary Caballero, Managing Partner of the Retirement Division of Impact Benefits & Retirement. "Managing Partner of the Employee Benefits Division, Candy Dietz, and I immediately noticed how our core values and guiding principles are parallel with OneDigital's, making this an exceptional cultural fit. Together, we can continue delivering on our commitment to our team, our clients, and our community."

SEBS of Oregon offers consulting services to help employers make the right business decisions regarding their employees. SEBS of Oregon provides employers with access to licensed employee benefits specialists to support employee benefit and human resources needs.

"We chose OneDigital as a partner because of its strong national presence and great reputation," said Cory Mahaffey, Managing Partner at SEBS of Oregon. "We believe our partnership with OneDigital will allow our nearly 250 clients to have access to a broader range of tools and expertise."

Impact Benefits & Retirement and SEBS of Oregon will continue serving clients in adjacent roles operating alongside OneDigital's existing Pacific team. As part of the alignment, the two offices will merge with shared oversight and management from Dietz and Caballero.

OneDigital continues to pursue partnerships with similar agencies providing innovative solutions and expertise. To date, OneDigital's comprehensive advisory services and market-leading solutions are offered in more than 100 offices and 2,400+ business strategists supporting the needs of over 85,000 employers across the nation.

## **About OneDigital**

OneDigital is the nation's leading health, retirement/wealth, and HR advisory firm focused on empowering business growth for employers of all sizes, and has consistently led as a workplace ally for over 20 years. OneDigital's unique ability to converge health, wealth and human resources into a hub of services and business guidance has empowered companies to create workplaces that attract and retain talent while fueling innovation and company growth. As employee health care, wellness and workplace benefits continue to shift, companies of all sizes have relied on OneDigital's exceptional advisory teams for counsel and its adjacent services, including employee benefits, holistic HR services, employee wellbeing and pharmacy consulting, as well as the retirement and wealth management services provided through OneDigital Investment Advisors. Headquartered in Atlanta, OneDigital's more than 100 offices and 2,400+ business strategists serve the needs of over 85,000 employers across the nation.

OneDigital has been named to the Inc. 5000 List of America's fastest-growing companies every year since 2007, one of only 11 companies to do so and is currently listed as 18th on Business Insurance's list of 100 Largest U.S. Brokers. For more information, visit [www.onedigital.com](http://www.onedigital.com).

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## **About Impact Benefits & Retirement**

In 2016, business partners Candy Dietz and Mary Caballero purchased Heestand Company & Gahlsdorf Insurance to create Impact Benefits & Retirement, headquartered in Portland, Oregon. Impact Benefits & Retirement specializes in providing a holistic combination of health & benefits advising and retirement & wealth solutions for businesses and individuals. As a Certified B Corporation, the firm has committed to conducting all business with integrity to make a broader positive impact on its neighbors, community, and industry. To learn more about Impact Benefits & Retirement, visit <http://www.impactbenefits.com/>

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## About Strategic Employee Benefit Services of Oregon

Strategic Employee Benefit Services of Oregon is committed to helping clients make appropriate business decisions regarding their employee benefit plans by combining the best products for their unique needs, with outstanding service. Their team of consultants strives to identify and develop exceptional people and empower them to deliver an extraordinary customer experience.


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