



Marvin D. Révoal, CIC, Senior Principal and Owner

Mission and Services

We aspire to be an effective business partner. We provide business consulting services, design and manage employee benefit programs, provide risk solutions, provide bond products, and help clients attain a healthy financial future through a comprehensive coordination of company sponsored benefits and individual investments.

Areas of Experience:

- Employee Benefits
- Executive Deferred Comp
- Life and Disability
- Pensions
- Property & Casualty

Licenses:

- Health & Life
- Securities
- Property & Casualty

PBP ia Certified:

DBE/WBE/ESE #7673

541-341-3478

503-223-3638

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Marvin uses his experience in management, underwriting, training, and brokering with regional and national carriers to create comprehensive group benefits packages for businesses. He has experience designing plans for multi-site and multi-state businesses. He has researched traditional and non-traditional models of funding for self-funded plans as well as designed self-funded components to complement fully funded plans. Marvin understands association affiliate programs and has experience designing and working with such programs. He has experience assessing the capabilities and services of third party administrators and developed a model for using wellness plan biometrics obtain premium offsets from participating carriers.

Marvin works closely with business owners and key personnel to develop deferred executive qualified and nonqualified compensation programs. He designed one of the largest executive deferred compensation programs underwritten and placed in Oregon

First licensed in 1979, Marvin has a comprehensive understanding of risk, the value of coordinating business insurance coverages, and the need for resources to develop policies, procedures and training for loss control.

Marvin brings years of business leadership relating to board development, strategic planning, financial stability, and continuation planning for non-profits, city chambers, and advisory boards. He is the current past president of the Eugene Chamber of Commerce, having served for 8 years on the Board of Directors and is a member of the Advisory Board for the Portland African American Chamber of Commerce. A founding member of Greater Portland, he is also active in the Portland Business Alliance with a goal of business development and recruitment. Governor Kitzhaber appointed Marvin to the "Oregon Workforce Investment Board". He serves on the Executive Board of "WVDO" (Willamette Valley Development Officers)

Securities offered through Sammons Securities Company, LLC.
Member FINRA/SIPC.