WELLSPRING

A News Source Brought to You by Wealthspire

Specialized Knowledge

Brought Together

WEALTHSPIRE

Industry Recognition

FRANK P. MARZANO, MANAGING DIRECTOR

BARRON'S Hall of Fame Advisor

2025 · Barron's
Frank P. Marzano–Barron's Advisor Hall of Fame
Frank P. Marzano, Barron's Advisor Hall of Fame 2024: Awarded September 13, 2024 , based on data as of 6/30/2025.

BARRON'S ADVISOR **Top 100 Independent Advisors** 2025
Frank P. Marzano, Barron's Top Individual Advisor 2025: Awarded September 13, 2025, based on data as of 6/30/2025.

BARRON'S ADVISOR **Top 1200 Financial Advisors** 2025
Frank P. Marzano, Barron's Top 1200 Financial Advisors (GM Advisory Group): Awarded September 13, 2025 , based on data as of 6/30/2025.

2025 · Forbes
Frank P. Marzano–Best-In-State Wealth Advisor
Frank P. Marzano, Forbes Best-in-State Wealth Advisor 2025: Awarded April 2025, based on data as of 06/30/2025.

SOUTH FLORIDA BUSINESS JOURNAL

2024 · South Florida Business Journal
Best Places to Work
South Florida Business Journal – Best Places to Work: Awarded September 13, 2024 , based on data as of 6/30/2025.

WEALTHSPIRE FIRMWIDE RANKINGS

2025 · *Worth Magazine*
Top RIA Firms
Worth – Top RIA Firms – Published March 3, 2025 based on data developed in collaboration with Institutional Shareholder Services (ISS) as of 12/31/24.

2025 · InvestmentNews Awards
5-Star RIA Firms
InvestmentNews – 5-Star RIA Firms – Published September 10, 2025

2026 · Newsweek
America's Top Financial Advisory Firms
Newsweek – America's Top Financial Advisory Firms 2026 – Published November 14, 2025, based on data as of September 2025.

2025 · Citywire
50 Growers Across America
Citywire – 50 Growers Across America – Published August 2025, based on 2024 performance data.

USA TODAY

2024 · USA Today
Best Financial Advisory Firms
USA Today – Best Financial Advisory Firms – Published April 22, 2025, based on market research from Statista for 2023-2024.

WEALTHSPIRE IS COMPOSED OF A DEEP POOL OF TALENTED TEAM MEMBERS.

Our clients are supported by an exceptional investment team and have access to in-house professionals such as trust and estate attorneys. This landscape further positions us to provide our clients with creative and sound solutions.

Across the Wealthspire Family of Companies:

TOTAL EMPLOYEES
1,200+

TOTAL ADVISORS
200+

TOTAL CFP® PROFESSIONALS
130+

OFFICE LOCATIONS
43

TOTAL AUM/AUA
$580 billion

*Reflects combined data as of 6/30/2025 for Wealthspire Advisors LLC, Fiducient Advisors LLC, Wealthspire Retirement, LLC dba Wealthspire Retirement Advisory, Newport Private Wealth Inc., and affiliates.

Dear Valued Clients and Partners,

As we start a new year together, we want to take a moment to thank you for the trust and confidence you place in us. Your partnership continues to inspire our commitment to serving you, your family, our communities, and the financial services industry as a whole.

The year 2025 marked a pivotal step forward in our firm's service offering as Wealthspire Advisors, Fiducient Advisors, Newport Private Wealth, Wealthspire Retirement Advisory, and Ground Control Business Services began operating together under a unified brand. This milestone reflects a deeper collaboration with shared vision for the future. Together, we continue to retain and recruit top talent to offer expanded capabilities and deeper expertise while preserving the personalized care and boutique approach that define our relationships.

As our investment platform grows, clients benefit from deeper resources, broader access, and an expanded suite of solutions. Our investment team continues to deliver exceptional offerings while our specialists in tax planning, estate strategies, Family Office Accounting, and concierge services support every aspect of a client's financial life. With a platform built to anticipate change, we provide the insights and tools that help clients navigate transitions and stay focused on the life they've worked hard to build.

As part of our blossoming culture of partnerships, this year also brought exciting growth to our advisor network. We welcomed RoundAngle Advisors, led by Jonathan Bernstein, CFP®, CPA, and Family Wealth & Pension Management, founded by Ian Weinberg. Both additions further strengthening our presence in the Tri-State area while adding decades of expertise to our team. These partnerships reflect our commitment to building a team that is committed to shaping a sustainable future while staying aligned to our core values.

As we move into 2026, we do so as one Wealthspire team, aligned in vision, united in purpose, and energized by the opportunities ahead. Thank you for bringing your unique experiences and aspirations to us. They inspire our dedication to you and your family for generations to come.

With Deep Appreciation,

Frank P. Marzano

Frank P. Marzano, CFP®, CPA
Managing Director

Rising Gen

Our platform of resources & tools for our clients' children

INVESTING IN THE FUTURE

Rising Gen is rooted in the belief that what matters to you, matters to us. We are dedicated to empowering the next generation to steward their family's wealth, values, and legacy while creating their own path through trusted resources and meaningful connections.

WATCH TO LEARN MORE

THE INVESTMENT LAB SERIES

Hosted by Michael Bueti and Michael Bongiorno, The Investment Lab series kicked off our Rising Gen workshops and connected advisors with peers to explore a trading simulator and investment fundamentals in real time. This workshop opened the door to meaningful financial conversations across generations, deepening our engagement with the families we serve closely.

COLLEGE ADVISORY SERIES

Our Rising Gen program partnered with the college advisory service ESM Prep to provide families with strategic insights on the college admissions process and planning for success postgraduation. College admissions experts and undergraduate mentors dove into essential topics, including how to research colleges effectively, understand shifts in testing, and how to develop an impressive résumé to stand out in a competitive field.

Recordings for both webinars are available on the Rising Gen website, and our advisors are happy to connect you with ESM Prep for personal guidance.

RISING GEN LIBRARY

STAY TUNED FOR MORE

EDUCATIONAL SESSIONS • ONE-ON-ONE COACHING • FAMILY INTEGRATION AND COMMUNICATION

Left to right: Madison O'Reilly, Office Coordinator; Michael Bongiorno, FPQP™, Advisor Associate; Belle Bennett, Advisor Associate; Raymond Kramer, Advisor Associate; Alyson Woolbright, FPQP™, Senior Advisor Associate; Andrew Frattaroli, CFP®, AVP; Katarina Obermaier, FPQP™, Senior Advisor Associate; Michael Zeitler, CFA®, AVP; Michael Bueti, CFP®, AVP; Jared Wolfe, CPA, CFP®, AVP; Lilli Seidman, Advisor Associate; Kevin Flaaen, VP; Shannon Thieke, Advisor Associate; Jenna Wolfe, Marketing Associate

Ask Us!

We are here for your family and children

WELLSPRING WINTER 2026

Core Values

Guiding Every Decision We Make

RESPONSIBLE RELATIONSHIPS

We treat our clients the way we want to be treated. We uphold the pillars of a strong relationship: We actively listen, ask the right questions, offer trusted advice, communicate with transparency, and consistently show up, personally and professionally.

COLLECTIVE INTELLIGENCE

We actively promote the expansion of our knowledge, recognizing that investing in the professional growth of our team members provides value to our clients. We continually seek out new ways to build our in-house capabilities and integrated network of professionals in service to the goal of providing seamlessly tailored financial planning and advice.

SERVICE INNOVATION

To deliver the highest level of personalized service, we continually deepen our understanding of what works best for our clients. We strive to exceed the expectations of a leading wealth management firm by investing in technology and seeking out new ways to improve the client experience.

PERFORMANCE ACCOUNTABILITY

We bring innovative thinking to our disciplined investing framework and all our services to pursue the specific goals each client defines. By prioritizing results, we aim to promote client confidence through unpredictable markets and support their goals of creating and preserving wealth for future generations.

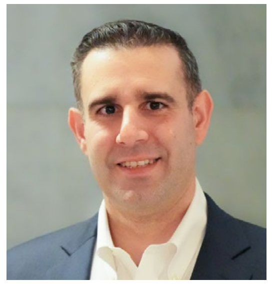
Our core values have remained consistent from the start. Fully embraced by our team, they are deeply embedded in our culture—defining who we are now and always.

Leading the Way

Spotlight on Our People

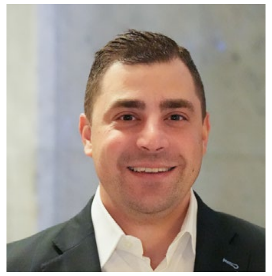
Christopher Castellano, CFP®, CPA
Managing Director

Our regional lead, Christopher Castellano, brings extensive tax expertise to every aspect of his wealth and estate planning work. He develops creative, customized solutions for the complex planning needs of senior executives and multigenerational families, grounding every strategy in each client's unique circumstances. With more than a decade of experience, Chris is known for navigating intricate tax structures and delivering thoughtful, high-impact guidance.



Charles Scarallo, CFP®, CPA
Managing Director

Charles Scarallo brings deep tax expertise and nearly 20 years of finance experience to the clients and families he serves. He partners with our investment and advisory teams to design holistic plans that support wealth accumulation, succession planning, and tax-efficient wealth transfers for high-net-worth individuals, multigenerational families, and business owners.



Frank J. Lavrigata, CFP®
Managing Director

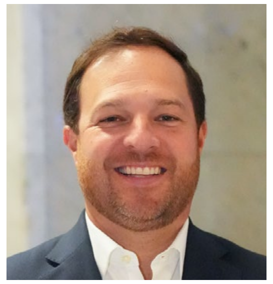
Frank J. Lavrigata is a CFP® who has been with the firm for nearly two decades. He is known for his thoughtful and relationship centered approach as he had success cultivating long standing relationships with clients and continues to work with new families. While Frank's core expertise is investment management, he works with a wide range of clients, including those looking for guidance in navigating unfamiliar or complex financial situations.

Patrick Wren
Managing Director

Patrick Wren's deep technical expertise and relationship-focused approach continuously raise standards for his diverse client base of attorneys, business owners, and professional athletes. Patrick analyzes and implements effective wealth management strategies, covering investments, income and estate tax planning, charitable giving, insurance, and retirement planning.

Brian McAuliffe, JD
Managing Director

Brian McAuliffe is a knowledgeable and dedicated advisor, helping CEOs, entrepreneurs, and families navigate complex financial landscapes. A Columbia University and University of Notre Dame alumnus, McAuliffe studied literature and law, which equipped him with a broad and deep intellectual foundation from which to understand each client and present custom solutions for their financial situations.



Michael J. Santo
Managing Director

Michael Santo brings more than 20 years of investment expertise to Wealthspire, serving high-net-worth families, business owners, and professionals across the Northeast and South Florida. He previously spent 16 years as a portfolio manager at Bank of America Private Bank, sharpening his understanding of markets and client needs. A graduate of the Fordham University Graduate School of Business, he pairs a strong economics background with a lifelong passion for investing.

Eric Bernstein, CAIA®
Senior Vice President, Investments

Since joining the firm in 2015, Eric Bernstein has focused on sourcing and evaluating alternative investment strategies to help clients navigate the complexities of private markets to achieve enhanced risk-adjusted investment outcomes. He applies his expertise to clients' private investment portfolios with detailed due diligence, comprehensive guidance, and transparent reporting.

Joseph Devine
Senior Vice President, Advisor

Based in San Diego, Joseph brings more than 25 years of global institutional investment experience, having managed assets for some of the world's largest pension funds and led several successful mutual funds. He most recently served as Global Chief Investment Officer at Macquarie Asset Management, where he oversaw international growth equity strategies with a focus on global small-caps and emerging markets.

Your First Point of Contact

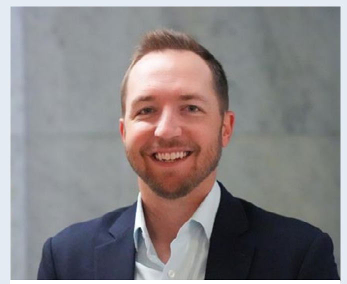
At the Heart of Client Service

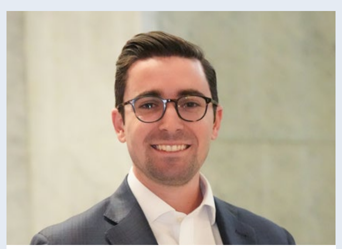
When questions arise or support is needed, our service advisors are the first call clients make. They are familiar faces who know your story and understand your priorities.

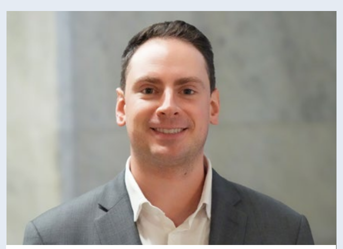
By combining financial insight with genuine connection, these professionals create an experience that feels personal and effortless. They coordinate resources across our teams, keep communication clear, and make certain that solutions align with your goals. For clients, this means confidence in every interaction and the assurance that someone who truly knows them is always ready to help.

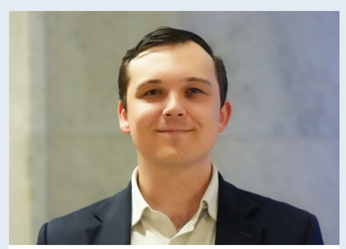

Taylor Stathis, CFP®, Senior Vice President

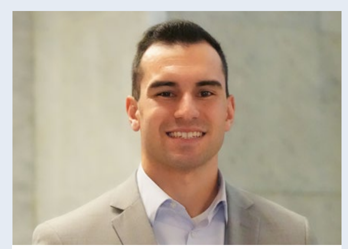

Carolina Llano, CFP®, Senior Vice President

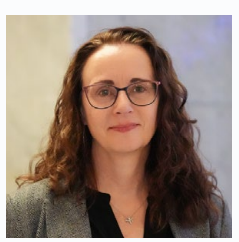

Kevin Flaaen, Vice President


Michael Bueti, CFP®, Assistant Vice President


Michael Zeitler, CFA®, Assistant Vice President

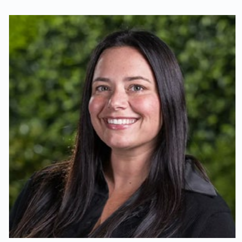

Andrew Frattaroli, CFP®, Assistant Vice President


Jared Wolfe, CPA, CFP®, Assistant Vice President



Rosey Timoney, CFP®
Senior Vice President

"Getting to know our clients and their families isn't just part of the job—it's a privilege. Each conversation deepens our understanding of what matters to them most, so we can make life easier, build confidence, and ensure their goals are protected for generations."



Lyndsey Gorham
Senior Vice President

"With over fifteen years devoted to client service, I've come to understand that true success is built on relationships. The trust clients place in me is both a privilege and a responsibility. It is one that drives me to approach every detail with care and integrity. At the end of the day, I hope to bring my clients peace of mind."

Strengthening Our Team

With Our Newest Advisors

We partner with like-minded advisors who share our client-first vision, joining forces to expand our team and strengthen the expertise we offer. Each new addition brings fresh perspective and deep experience, enhancing the personalized care and trusted relationships that define Wealthspire.


Left to right: Nela Diaz, AVP, Client Services; Jon Bernstein, CPA, CFP®, Managing Director; Deirdre DeRosa, CFP®, Senior Advisor Associate

JONATHAN BERNSTEIN AND ROUNDANGLE ADVISORS JOIN WEALTHSPIRE

Wealthspire is thrilled to welcome RoundAngle Advisors, a Red Bank, NJ-based firm founded by Jonathan Bernstein, CFP®, CPA. For more than a decade, Jonathan Bernstein, Nela Diaz, and Deirdre DeRosa, CFP® have guided families through personalized financial planning with care and expertise. This partnership strengthens our presence in the Tri-State area and reflects our shared commitment to client-first values, thoughtful planning, and meaningful relationships. Clients will continue to enjoy the hallmark of personal attention, now supported by Wealthspire's expanded resources and national platform.

WATCH ERIC SONTAG'S INTERVIEW WITH JON


Left to right: Barbara Fried, Client Service Associate; Ian Weinberg, CFP®, Managing Director; Starr Cappetta, AVP, Client Service

IAN WEINBERG AND FAMILY WEALTH & PENSION MANAGEMENT JOIN WEALTHSPIRE

We are excited to announce that Family Wealth & Pension Management, led by CEO and Founder Ian Weinberg, CFP®, has joined Wealthspire. Ian, Starr Cappetta, and Barbara Fried bring more than 70 years of combined experience serving high-net-worth families and individuals. Their deep expertise in financial planning, tax guidance, and pension solutions will enhance our capabilities and strengthen our regional presence. We warmly welcome Ian and his team and look forward to the value they will bring to our clients and our growing organization.

WATCH ERIC SONTAG'S INTERVIEW WITH IAN

Your Advice Team

A small team specifically assigned to you, aligned with your goals, and powered by our core values.

Left to right: Raymond Kramer, Advisor Associate; Belle Bennett, Advisor Associate; Kevin Flaaen, VP; Layla Keen, Client Service Associate; Michael Santo, Managing Director; Chris Castellano, CPA, CFP®, Managing Director, East-GM Region Leader; Andrew Frattaroli, CFP®, AVP; Lilli Seidman, Advisor Associate; Joseph Devine, SVP; Juliana Gadaleta, Senior Associate, Wealth Planner; Jared Wolfe, CPA, CFP®, AVP

Left to right: Barbara Fried, Client Service Associate; Ian Weinberg, CFP®, Managing Director; Starr Cappetta, AVP, Client Service

Left to right: Alyson Woolbright, FPQP™, Senior Advisor Associate; Michael Bueti, CFP®, AVP; Rosemary Timoney, CFP®, SVP; Frank Lavrigata, CFP®, Managing Director; Elizabeth Sforza, Senior Client Service Associate; Michael Bongiorno, FPQP™, Advisor Associate: Shannon Thieke, Advisor Associate

Left to right: Nela Diaz, AVP, Client Services; Jon Bernstein, CPA, CFP®, Managing Director; Deirdre DeRosa, CFP®, Senior Advisor Associate

Left to right: Molly Bowe, Advisor Associate; Kerry Bragg, AVP, Client Service; Charles Scarallo, CPA, CFP® , Managing Director; Taylor Stathis, CFP®, SVP; Michael Zeitler, CFA®, AVP; Lyndsey Gorham, SVP; Katarina Obermaier, FPQP™, Senior Advisor Associate

Left to right: Liam Smith, Advisor Associate; Vincent Pecoraro, FPQP™, Senior Advisor Associate; Patrick Wren, Managing Director; Kevin Flaaen, AVP; Carolina Llano, CFP®, SVP; Nicholas Crapanzano, Client Service Associate

Our Comprehensive Service Offerings

Understanding that each client is unique, we collaborate with you to create tailored solutions that address your specific needs, goals, preferences, and circumstances. Our core services are driven by specialized teams in areas such as investment and portfolio management, family office accounting, and wealth strategies. These services are provided by your dedicated advice team and enhanced with insights from across our organization.

WHAT WE CAN DO FOR YOU

- Financial Planning
- Asset Management
- Tax Planning
- Insurance & Risk Management
- Generational & Estate Planning
- Family Governance & Education
- Banking & Credit Facilities
- Charitable Planning
- Cash Flow Management & Bookkeeping
- Concierge Services
- Due Diligence for Alternative Investments
- Project-Based Planning
- Corporate Accounting

Our Comprehensive Service Offerings

Family Office Accounting Services

Our Family Office Accounting team provides streamlined, high-touch financial management designed to save you time, ensure accuracy, and support long-term financial clarity.

WE SET IT ALL UP FOR YOU

We customized a system for managing your financial logistics.

- **Bill Pay:** We streamline day-to-day financial responsibilities.
- **Vendor Management:** Bills are sent directly to a dedicated inbox, and we coordinate with vendors so you don't have to.
- **Payroll:** We manage household employee payroll, ensuring compliance and proper documentation.

CUSTOMIZED REPORTING, YOUR WAY

Our customized reporting and budgeting processes provide your family with a clear, consolidated view of their financial picture.

- **Quarterly & Annual Book Closings:** We maintain clean, accurate books for strategic planning and tax readiness.
- **Categorization for Tax Efficiency:** Tools such as Bill.com allow us to consistently tag expenses to reduce tax liability and improve reporting accuracy.
- **Budget Tracking:** We categorize and align spending to provide clear, customized budget insights.

LEAVE THE EFFICIENCY TO US

Your bills and expenses are handled with precision, efficiency, and on-time execution.

- **Streamlined Assurance:** We handle the day-to-day operations, so you can focus on what matters most.
- **Consistency & Accuracy:** Proper categorization reduces errors and maximizes deductions.
- **Personalized Support:** A dedicated FOA team that knows your financial landscape and manages the details end-to-end.

Did You Know?

We provide outsourced accounting services for businesses owned by our clients. If you have your own business and need financial oversight, reporting, or day-to-day accounting support, we can serve as your controller to help you operate efficiently and strategically.

WHAT THIS MEANS FOR YOU

More time back in your day, clear insight into your financial situations, and the peace of mind that comes with knowing your affairs are handled securely and professionally.

Our Comprehensive Service Offerings

Investment Management

Built on Expertise and Discipline

Our investment team sets us apart with research-driven insights and collaborative strength.

EXPANDING OUR INVESTMENT DEPTH

Independence shapes Wealthspire's investment philosophy, allowing us to avoid proprietary products and draw on a broad network of managers, economists, and research partners to deliver strategies tailored to each client. We collaborate with qualified professionals, including legal advisors, tax specialists, and investment managers to provide you with the resources and opportunities that are right for you. As Wealthspire continues to scale, our expanded investment team and collaborative structure give clients the advantage of greater resources, top industry talent, and shared intelligence.

Brad Long, CFA®
Chief Investment Officer

Brad Long is Wealthspire's Chief Investment Officer with nearly two decades of experience guiding investment strategy and driving research innovation. He has led portfolio construction and chaired key committees across wealth, institutional, and retirement markets. His background at Fiducient Advisors, along with earlier research roles at Citigroup and Wells Fargo, gives him deep insight into global markets and disciplined investment research. As CIO, he brings collaborative leadership and a sharp strategic lens that elevates Wealthspire's ability to deliver innovative, client-focused solutions.

Across the family of Wealthspire companies, we now represent a combined investment platform of:

40+
INVESTMENT PROFESSIONALS

6
TEAMS

20+
CFA® DESIGNATIONS

$580B
ASSETS UNDER MANAGEMENT

10,000
CLIENTS

40+
ADVANCED DEGREES

Safeguarding Your Assets

Our Highest Priority

WE PARTNER WITH HIGHLY-TRUSTED BANKS TO ENSURE YOUR ASSETS ARE SECURE

Our custodians include widely recognized for their service capabilities and operational scale. They manage key functions such as the execution, clearance, and settlement of transactions. As our chosen custodians, they are responsible for the safekeeping, receipt, and delivery of client funds and securities. Protecting client assets is a core priority for our preferred custodians, and they are distinguished by their long-term financial stability.

By leveraging the strengths of leading custodial partners, we provide our clients with choice; confidence; and the assurance of a secure, reliable foundation.

THE POWER OF CHOICE

PARTNERING WITH THREE ESTABLISHED CUSTODIANS TO SERVE OUR CLIENTS

As a Registered Investment Advisory (RIA) firm, we pride ourselves on offering clients the independence, flexibility, and personalized service that define fiduciary excellence.

BNY, Fidelity, and Charles Schwab each bring a unique set of capabilities to the table, all grounded in rigorous asset protection standards, cutting-edge technology, and a commitment to investor security. This allows us to tailor solutions to each individual circumstance with precision, aligning our clients' individual needs with the strengths of the custodian best suited to their goals.

WELLSPRING WINTER 2026

Wealthspire in the Mix

At the table with the brightest minds

Thought Leadership: Recent Articles & Achievements

Left to right: Charles Scarallo, CPA, CFP®, Managing Director; Andrew Frattaroli, CFP®, AVP

THINKADVISOR LUMINARIES AWARDS

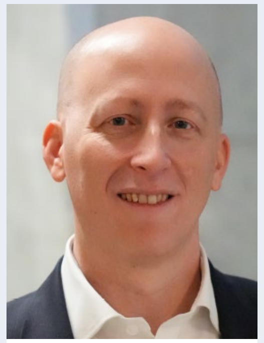
We're proud to announce that Charles Scarallo and Andrew Frattaroli were recognized at the ThinkAdvisor Luminaries Awards. As individuals who set the standard for excellence and innovation across the profession.

Charles Scarallo was awarded the "Luminaries with Heart" award, celebrating individuals who have made exceptional contributions to philanthropy or initiatives that positively impact communities.

Andrew Frattaroli received the "Next-Gen Rising Stars" award, recognizing professionals with under 10 years of industry experience who contribute to newsworthy and outstanding results.

READ MORE

Charles Scarallo, ThinkAdvisor Luminaries With Heart Award: Awarded December 4, 2025 , based on data as of 9/30/25; Andrew Frattaroli, ThinkAdvisor Next-Gen Rising Stars Award: Awarded December 4, 2025 , based on data as of 9/30/25



Chris Castellano, CFP®, CPA, Managing Director

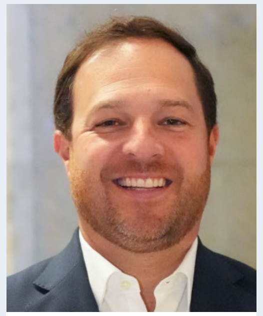
Juliana Gadaleta, Senior Associate, Wealth Planner

RESPONDING TO TAX UPDATES IN REAL TIME

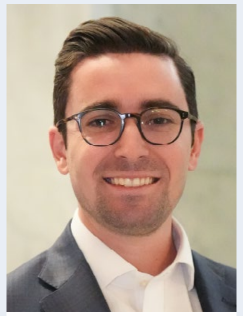
Chris Castellano and Juliana Gadaleta remain constantly informed of tax policy proceedings to prepare themselves for resource development, so clients can immediately access timely and accurate materials without needing to ask.

With the signing of the "One Big Beautiful Bill" into law, Chris and Juliana efficiently developed a detailed review of the changes to share on our website and with our clients.

READ MORE



Michael Santo, Managing Director



Michael Bueti, CFP®, AVP

YOUR FINANCIAL PICTURE, ALL IN ONE PLACE

Michael Santo and Michael Bueti cowrote an insightful blog that highlights the advanced portfolio aggregation and reporting technology we use to consolidate client assets into a clear, comprehensive overview. Our team leverages this tool to enable better asset allocation, risk management, and confident financial decision-making aligned with clients' objectives.

READ MORE

From left to right: Michele Walthert, CFP®, CRPC®, Managin Director, Head of Advisor Services, Mike Delgass, J.D., Managing Director; Christopher Castellano, CPA, CFP®, Managing Director; Tim Hughes, CFP®, Managing Director

IGNITE SUMMIT

Chris Castellano joined colleagues from across the country at the IGNITE! Summit in Chicago from October 8 to 10. The high-energy gathering focused on unifying teams, exchanging ideas, and building momentum for the future of the firm.

Second from right: Christopher Castellano, CPA, CFP®, Managing Director; *Not pictured: Josh Goldsmith, CPA, SVP, Head of Family Office Accounting

BNY PERSHING LEADERSHIP FORUM

Christopher Castellano and Josh Goldsmith continue to develop their leadership expertise, building on their experience at Pershing's Leadership Forum. They sat in on insightful presentations, participated in team building activities, and pitched innovative ideas on leveraging technology.

Left to right: Eric Bernstein, CAIA, SVP; Paul Tanner

LAS OLAS INVESTOR CONFERENCE

Eric Bernstein attended the annual Las Olas Investor Conference, bringing together Florida real estate moguls. Eric is pictured with Paul Tanner, an investment partner of ours and the founder of Las Olas Capital Advisors and a founding member of Las Olas Venture Capital.

AI INNOVATION TRAINING

Many of our team members attended NFP's AI Innovation Training on October 1. Sessions throughout the day explored how AI tools such as Copilot and ChatGPT can boost productivity, protect data, and improve client service, with strategic prompting. We are always eager to adapt and innovate to best serve our clients.

WELLSPRING WINTER 2026

Left to right: Natalie Sequeira, Senior Data Operations Associate; Troy Solland, VP, Advisory Technology

DREAMFORCE CONFERENCE

Natalie Sequeira attended Salesforce's Dreamforce Conference with Channing Olsen, our chief operations officer, and Troy Solland, vice president of advisory technology. Dreamforce 2025 spotlighted Salesforce's AI platform, Agentforce, and its potential to transform how teams work by supporting, rather than replacing, human decision-making.

Left to right: Spencer Weiss, FPQP™, Investments Associate: John Green, Data Operations Associate; not pictured: Katarina Obermaier, FPQP™, Senior Advisor Associate

REDBLACK CONFERENCE

Spencer Weiss, John Green, and Katarina Obermaier were surrounded by hand-selected professionals at this year's RedBlack Conference to learn about the future of reporting. RedBlack previewed upcoming features such as SMA account consolidation, auto-import, conditional constraints, and Addepar integration.

Left to right: John-David Kirby, Senior Family Office Accountant; Josh Goldsmith, CPA, SVP, Head of Family Office Accounting; not pictured: John Green, Data Operations Associate; Rina Edelstein, CPA, Family Office Accounting Manager

INTUIT CONFERENCE

Members of our Family Office Accounting and Technology teams attended Intuit Connect, an annual accounting conference. Josh Goldsmith, Rina Edelstein, J.D. Kirby, and John Green learned about AI innovation, leadership, and building stronger human connections from various keynote speakers and breakout sessions.

WELLSPRING WINTER 2026

Wealthspire Good Works

Our ongoing commitment to community

THE AMERICAN EXPRESS PGA TOURNAMENT

As Chairman of Impact Through Golf, Frank Marzano helped elevate Wealthspire's presence as a premier sponsor of the American Express PGA Tournament through his long-standing relationships with the event. He also competed as an amateur alongside other golfers and fellow amateur participants, reinforcing the connections that make this tournament such a meaningful partnership for our firm.

IMPACT THROUGH GOLF CHARITY DAY

Frank joined Impact Through Golf as they carried on their annual tradition of presenting $1,000,000 in donations to Coachella Valley charities. The event brings supporters together each year to celebrate and strengthen the local organizations making a meaningful impact.

Left to right: Charles Scarallo, CFP®, CPA, Managing Director; Katarina Obermaier, FPQP™, Senior Advisor Associate; Lyndsey Gorham, SVP; Michael Zeitler, CFA®, AVP

SMILE FARMS GALA

Charles Scarallo, Lyndsey Gorham, Michael Zeitler, and Katarina Obermaier attended Smile Farms' Annual Fundraising Gala on November 20. Our long-standing relationship with Smile Farms is strong and one that holds tremendous value for our team as a whole. Charles serves as treasurer on the organization's Board of Directors and is passionate about Smile Farms's mission to provide meaningful employment and community to adults with disabilities.

> Persons with a disability are 3x less likely to be employed than those without a disability.
>
> Bureau of Labor Statistics, February 25, 2025

READ MORE

Left to right: Jenna Wolfe, Marketing Associate; Shannon Thieke, Advisor Associate

ISLAND HARVEST FOOD DRIVE

For Thanksgiving, our offices collected food and financial donations through Island Harvest's Turkey & Trimmings Collection Campaign to help provide meals to local families in need.

> According to the USDA, more than 47.9 million people, including 14.1 million children, in the United States are food insecure.
>
> Food Research & Action Center, December 31, 2025

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CRISTO REY BROOKLYN

On October 9, Frank Lavrigata attended Cristo Rey Brooklyn High School's Sixth Annual Golf Classic at Meadow Brook Club, where over $145,000 was raised to support students in need. Events like this highlight the importance of supporting youth education and creating opportunities that empower the next generation.

Left to right: Frank Balas, CFA®, Vice President, Investments; Michael Bongiorno, FPQP™, Advisor Associate; Michael Bueti, CFP®, AVP; Frank Lavrigata, CFP®, Managing Director

SAINT NICHOLAS GOLF OUTING

On September 4, Frank Balas, Michael Bongiorno, Michael Bueti, and Frank Lavrigata headed to Timber Point Golf Course for the annual St. Nicholas Golf Outing. Our team is proud to support St. Nicholas Greek Orthodox Church and attend their fundraising events.

WELLSPRING WINTER 2026

Left to right: Molly Bowe, Advisor Associate; Madison O'Reilly, Office Coordinator; Jenna Wolfe, Marketing Associate

PROJECT TOY

This holiday season, we kept the spirit of giving alive by contributing to Project Toy through the Family Service League in Huntington. The team donated new unwrapped toys and gift cards to put presents under the trees of children ages 0–16.

Carolina Llano, CFP®, SVP

INTERNATIONAL SCHOOL OF ARIZONA FINANCE COMMITTEE

Carolina Llano, senior vice president, is honored to join the Finance Committee of the International School of Arizona, a nonprofit dedicated to fostering multilingual and multicultural education. This role allows Carolina to support a client's mission while contributing to the school's vision for global learning. She looks forward to applying her financial expertise to assist the board's treasurer, strengthen fundraising efforts, and help ensure the school's long-term financial health and stability.

READ MORE

Wealthspire donates to dozens of nonprofit organizations that make a real impact in our communities. Here are a few worthy causes we've supported:

- Boca Raton Regional Hospital Foundation
- Cooley's Anemia
- COPE
- Cristo Rey
- Feeding America
- Impact Through Golf
- Lend A Hand
- Marcum Work Challenge
- Northwell Health-Huntington Hospital
- Oasis
- Project Toy
- Radical Hope Foundation
- Read Alliance
- Rotacare
- Smile Farms
- Spence Chapin
- StreetSquash
- SYJCC
- Tunnel to Towers
- Valerie Fund

Our team, often together with our clients, identifies causes we are passionate about and chooses to support nonprofit organizations that make real, tangible differences in the world. If there is a charity close to your heart, please share it with your Advice Team.

Wherever You Are, We're Here to Serve You

While we still maintain a devoted presence in the New York metropolitan and southern Florida regions, Wealthspire oversees 40+ additional offices to help meet you wherever you are.

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15th Floor
New York, NY 10175

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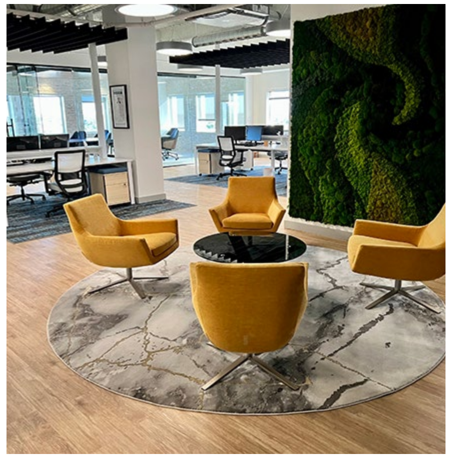
Suite 301
Melville, NY 11747



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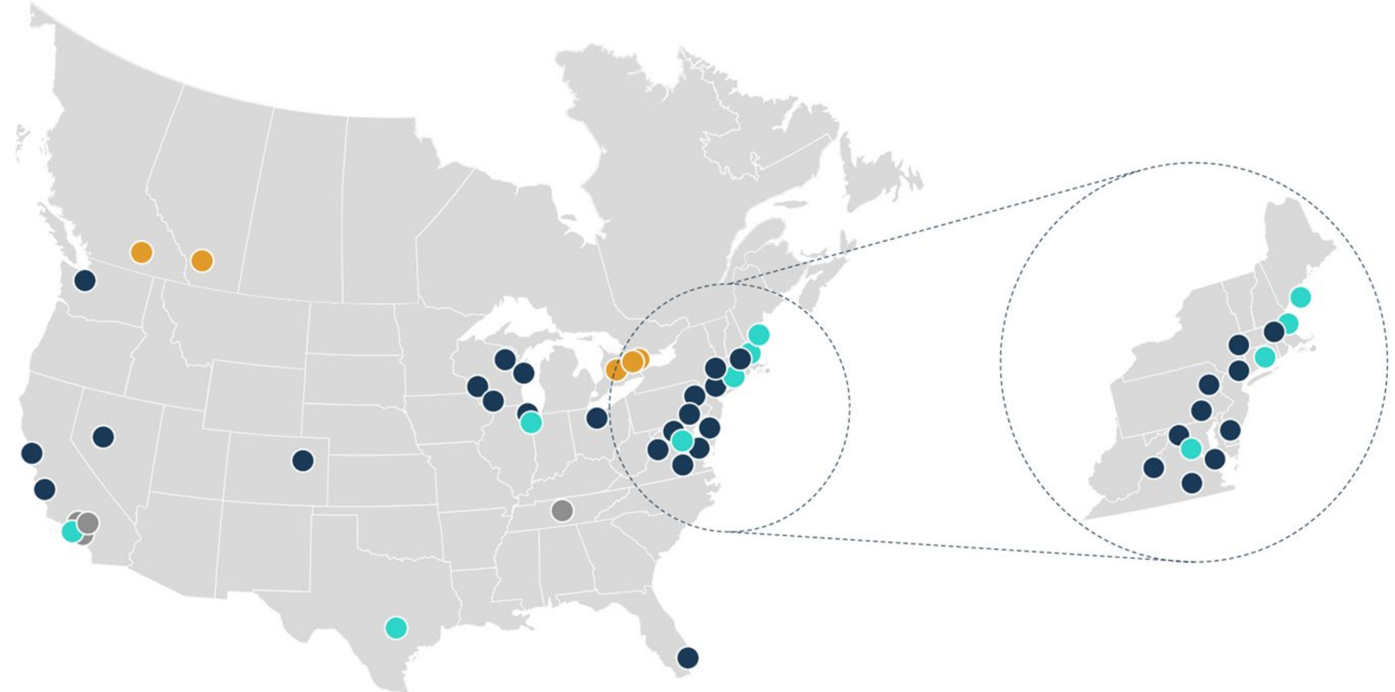

WELLSPRING WINTER 2026

WELLSPRING

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Our ***WELLSPRING*** magazine is published to keep our clients in the know about everything happening at Wealthspire.

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Investment opportunities are constantly evolving alongside changing economic conditions. As a result, it is important to regularly communicate our perspective on the prevailing market environment and how we approach positioning your investment portfolio based on our outlook.

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We provide our clients with up-to-date information and support around wealth planning strategies, such as estate planning and taxation, asset protection, insurance, philanthropy, and retirement benefits, and we encourage the important conversations that help people work through potential solutions together.

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WEALTHSPIRE

Stay tuned for more timely communications from our team as the economic and political landscapes continue to shift in the months ahead. For the latest news and updates, make sure to follow us on social media.

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