



ASPIRE

BY WEALTHSPIRE

2025 Annual Giving Report

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A Message from Mike LaMena

CHIEF EXECUTIVE OFFICER, WEALTHSPIRE

Dear Friends of Wealthspire,

ASPIRE reflects who we are as a firm—not just in what we do, but in why we do it. It was created to bring structure, focus, and greater reach to something we already saw happening organically across Wealthspire: **a deep, shared commitment to giving back to our communities and supporting causes that matter to our people and our clients.**

Across the firm, we have been continually inspired by the generosity of our colleagues, the dedication of our nonprofit partners, and the trust and engagement of our clients who share this commitment to making a difference. ASPIRE by Wealthspire exists because of them. It is a platform designed to honor that collective passion, align our efforts, and amplify the impact we can make together.

This first Annual Giving Report marks an important milestone for Wealthspire. In 2025, the firm contributed \$571,239* in charitable giving and supported 526 key initiatives across education, advocacy, partnership, and sponsorship. Beyond financial contributions, our people gave what may be our most valuable resource—their time—logging more than 500 volunteer hours in service of the communities where we live and work.

As we continue integrating new teams and expanding the communities we serve, our ambition for ASPIRE grows alongside the firm. Looking ahead to 2026, we expect to significantly amplify both our giving and our reach: supporting more organizations, raising awareness for more causes, and creating even more opportunities for our people and our clients to engage meaningfully as Wealthspire continues to unite as one firm.

I am deeply grateful to our employees, our partner organizations, and our clients for their leadership and shared belief that success is measured not only by growth, but by the positive impact we create together. ASPIRE is a reflection of that belief and a commitment to carry it forward.



“ASPIRE is our way of turning shared values into shared impact. As we grow and bring together new teams and perspectives, we’re more committed than ever to use our resources, relationships, and voice to uplift communities and advance causes that matter.

**MIKE LAMENA,
WEALTHSPIRE CEO**

*Wealthspire Advisors' total charitable contributions were 324,812 across 430 organizations. Fiduciant's total charitable contributions were \$216,728 across 86 organizations. Wealthspire Retirement's total charitable contributions were \$29,699 across 10 organizations.

Overview

What Is ASPIRE?



Wealthspire was built on a mission to serve others and make lives better. That service extends to our communities, and we are committed to giving back and making a difference as volunteers, sponsors, patrons, and board members.



ASPIRE is an enterprise-level, community-focused platform for giving and support, built on four key pillars: education, advocacy, partnership, and sponsorship.



Everyone at Wealthspire is a stakeholder in ASPIRE. Colleagues are encouraged to help identify the causes where we can make the greatest impact, while our Executive Leadership Team reviews firmwide priorities and determines national contributions each year, balancing enterprise-level focus with local community engagement.

Why This Report Matters

This Annual Giving Report reflects our commitment to transparency, accountability, and shared purpose in how we give.

It brings to life the collective impact made possible by the generosity of our people, clients, and partners, while offering a clear view of how ASPIRE focuses our efforts across the communities we serve. As our first report of its kind, and at a time of continued growth and integration, it serves both as a moment of reflection and a foundation for how we will continue to measure, expand, and amplify our impact in the years ahead.



The Four Pillars & Initiatives

1 Education

We are teachers. We strive to empower people to make smart financial decisions with confidence. That desire to teach extends beyond finances and plays a key role in raising awareness around issues that impact our communities, our industry, and the world.



Net Positive Consortium
In Wealth Management

NET POSITIVE CONSORTIUM IN WEALTH MANAGEMENT

Wealthspire is proud to be a founding member of the Net Positive Consortium, aligning with like-minded organizations that believe business can be a force for positive impact. Through this partnership, we continue to explore how leadership, culture, and accountability can drive meaningful progress across our industry and beyond.

2 Advocacy

We believe that by working together, we all rise. We are advocates for those without a voice, supporters of those in need, and champions for creating a world rooted in equity, diversity, inclusion and belonging.

CFP BOARD

WEALTHSPIRE CFP® BOARD DIVERSITY SCHOLARSHIP

The Wealthspire CFP® Certification Diversity Scholarship supports those from underrepresented communities with financial need pursuing CFP® certification. In 2025, this scholarship was awarded to 5 people.



3 Partnership

We recognize the incredible work already established in our industry focused on giving back to our communities. By partnering with key organizations, we can create more leverage to do more for those in need and to raise awareness of key issues that matter most to our people.



SPECIAL EDUCATION LEGAL FUND

Wealthspire partners closely with the Special Education Legal Fund (S.E.L.F.) to deepen our impact for families of children with special needs. In 2025, we participated in S.E.L.F.'s Stamford Resource Fair, hosted an educational webinar covering critical topics, and during the holiday season, Wealthspire made a donation on the Today Show's "Jenna & Friends," supporting S.E.L.F.'s John H. Hager Memorial Fund and further advancing legal advocacy for families in need. Wealthspire looks to continue to support the S.E.L.F. and their efforts in 2026.



**2025 ADVISOR
SUMMIT GIVING
PARTNER**

4 Sponsorship

With support comes sponsorship funding. We give with intention and in alignment of our cultural values. Sponsorship allows us to empower our local community nonprofits and further the causes of national organizations looking to create a better world for everyone.



OUR GIVING BY COMMUNITY

Central

Wisconsin



Ohio

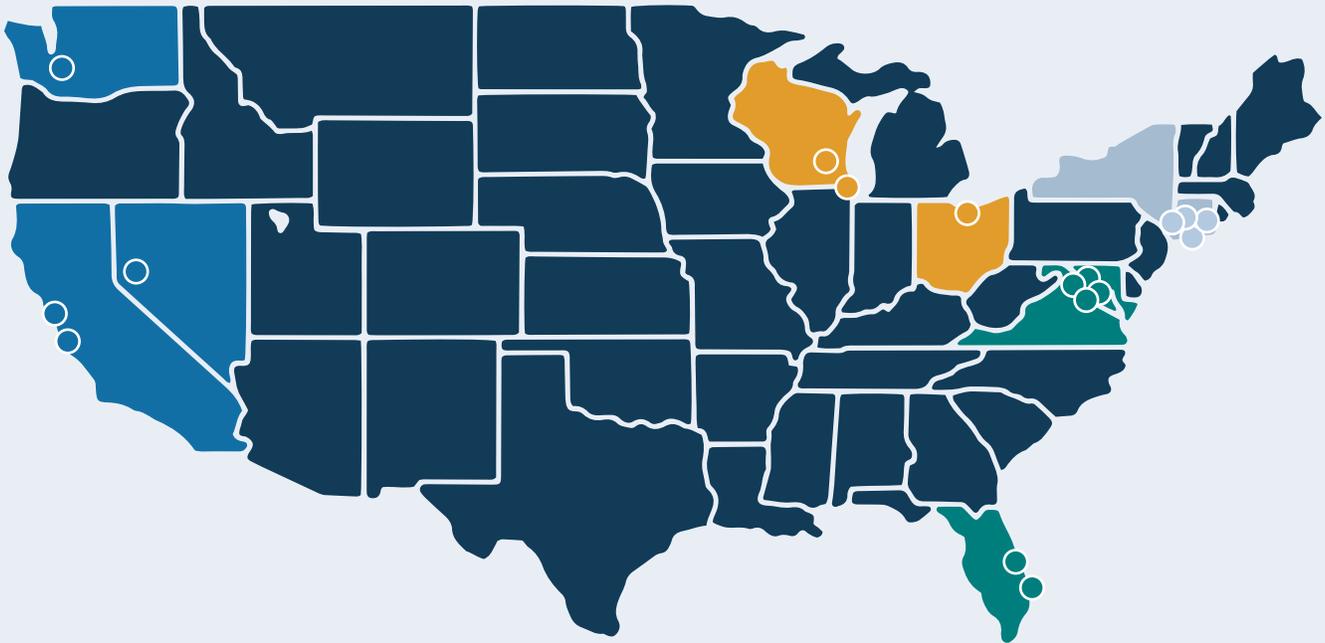


Northeast

Connecticut



New York



West

Washington



Nevada



California



Atlantic

Maryland



Virginia



Florida



This is just a snapshot of our giving. Many additional organizations are supported throughout the year by our firm and our people.

Year in Review: Impact Highlights



Financial Contributions

These contributions reflect a combination of firmwide priorities and local community commitments.

Total dollars
donated:
\$571,239¹

Breakdown by geography:

| | | | |
|------------------------------|-------------------------------|---|----------------------------|
| NORTHEAST \$30,533 | ATLANTIC \$77,369 | GM \$103,620 | CENTRAL \$26,645 |
| WEST \$86,647 | FIDUCIENT \$216,728 | WEALTHSPIRE RETIREMENT \$29,699 | |



Volunteer Engagement

At Wealthspire, we believe in investing not only in our clients, but also in the communities where we live and work. Through our Volunteer Time Off (VTO) Program, employees are encouraged to give back through an additional eight hours of paid time each year to participate in meaningful volunteer service. This dedicated time empowers our team to support causes they care about and make a positive impact beyond the workplace.

Number of volunteer hours:

540

A combination of the hours tracked as part of Wealthspire and Fiducient's VTO Programs and office-initiated volunteer events.

Major Volunteer Events



PAN-MASS CHALLENGE

For 6 years, Ben Kille and his family take part in a 2-day, 200-mile bike ride across Massachusetts to raise funds for the Dana-Farber Cancer Institute. Riding as Team Wealthspire, the Killes have raised over \$110,000 with \$30,000 being raised in 2025. We will continue to support them as they take on the challenge once again in 2026.



9/11 DAY

In 2025, the Cleveland, Ohio office spent the day taking part in 9/11 Day's signature Meal Pack program. In 2026, Wealthspire is proud to be a Community Sponsor and contribute as 9/11 Day hosts events in 50 cities. An anticipated 50,000 volunteers will assemble 20 million meals; all donated to Feeding America-affiliated food banks in each community.



MANNA FOOD CENTER

Each quarter, the Potomac, Maryland team volunteers at the Manna Food Center to help alleviate hunger through food distribution, education, and advocacy.



Strategic Partnerships: Highlighted Nonprofit Collaboration



WEST: CRISTO REY DE LA SALLE

Wealthspire's San Francisco office has an ongoing relationship with Cristo Rey De La Salle through its Corporate Work Study Program. The program empowers students from under-served communities by providing hands-on corporate experience while they work toward their college goals. We have been honored to host students in our office one day each week over multiple years. By investing in these young people, we are helping shape not just strong students, but future leaders who will make a meaningful difference in their communities.



GM: SMILE FARMS

Charles Scarallo is on the Board of Directors at Smile Farms, an organization that creates meaningful employment opportunities and community for adults with developmental disabilities. He was awarded the ThinkAdvisor Luminaries Award for "Luminaries with Heart" for his contributions as treasurer. The team volunteers at the farms each year, attends events such as the annual fundraising gala, and consistently donates to the cause.

Outcomes from key partnerships: Named to the San Francisco Business Times – Top 100 Corporate Philanthropists for the 3rd year in a row.

Awarded August 1, 2025, based on data as of 12/31/2024. For more on our awards and recognition, visit <https://www.wealthspire.com>



Stories of Impact

Karting for CKG video testimonial



[WATCH THE VIDEO](#)

The John Wolff Award for Excellence

Award Overview

In 2025, Wealthspire announced the inaugural John Wolff Award, recognizing one employee each year, as selected by an oversight committee, for their outstanding charitable leadership and community impact.

Named posthumously for John Wolff, a managing director in the Reston, VA office, the award honors John's dedication to his community through his life's philanthropic work. John was a pillar of the Hamilton and broader Loudoun County communities, serving on several boards and co-founding the Loudoun Impact Fund through the Community Foundation for Loudoun & Northern Fauquier Counties. He was known for his warmth, kindness, and unwavering support for those he loved, leaving a profound impact on all who knew him.



Wealthspire was honored to have John's wife, Lisa, present the award at our annual Advisor Summit.

Greg Friedman Named First-Ever Recipient

Greg's commitment to philanthropy and community service is deeply ingrained in both his personal life and professional career. Throughout his 30+ year career, he has consistently integrated philanthropic values into his work. Most notably, Greg's steadfast support of The Marine Mammal Center (TMMC) as a board member, donor, and volunteer have played a pivotal role in enabling TMMC to achieve significant milestones, including responding to over 1,400 reports of marine mammals in distress, publishing 12 scientific research papers, and leading or participating in 16 whale studies. Greg's contributions have also contributed to the expansion of TMMC's reach, creating a partnership with SR3 in Seattle, WA, marking a milestone in the organization's growth and ability to serve a broader population of marine mammals in need.

Other organizations Greg supports include Fed by Blue, UCSD Infusion Center, Feeding America, Climate Reality Project, Advisers Give Back, and Sea Shepherd USA, among many others.

Professionally, Greg has been honored with numerous awards over the years for his innovation and advocacy in the industry. In 2023, Greg was named the recipient of the FPA Heart of Financial Planning Award for his tremendous impact and contributions on the financial services industry.

“Philanthropy isn't just about giving—it's about creating lasting change, and I'm humbled to be a part of that journey.”

GREG FRIEDMAN, SENIOR STRATEGIC ADVISOR

Looking Ahead

ASPIRE is focused on scaling our impact with intention as Wealthspire continues to grow as one unified firm. Across our four pillars - education, advocacy, partnership, and sponsorship - we aim to increase firm-wide participation, expand the number and depth of nonprofit partnerships, and direct resources toward initiatives where we can drive measurable, lasting change. Our goals include amplifying awareness of key causes, creating more opportunities for hands-on engagement, and strengthening alignment between our philanthropic efforts, our people, and our clients.

As our reach expands, so does our responsibility. In 2026, we are committed to turning that growth into meaningful impact across the communities we serve.



About Us

About Wealthspire

Wealthspire is a leading wealth management, retirement advisory, and business management firm serving individuals, families, endowments, and institutions across the United States, Canada, and the United Kingdom. We provide a comprehensive platform that brings together wealth management, institutional consulting, business management, family office, and retirement plan advisory services—empowering clients to navigate complexity with clarity and confidence.

With over 1,200 employees across more than 40 offices², we deliver insights and solutions backed by deep research, technology, and decades of expertise. Our collective businesses create a unified ecosystem designed to meet clients wherever they are in their financial journey.

Wealthspire is redefining the future of financial solutions through collaboration, scale, and a steadfast commitment to putting people first—our clients, our colleagues, and our communities.

For more information, visit WWW.WEALTHSPIRE.COM.

Disclosures

¹Giving data reflects combined contributions from Wealthspire Advisors and newly merged entities during the reporting period. While total dollars donated are available across all entities, detailed breakdowns (e.g., by region, cause area, or office) are currently reported for Wealthspire Advisors only. Data systems for newly merged entities are being integrated, and expanded reporting will be available in future reports.

²Reflects 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.

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