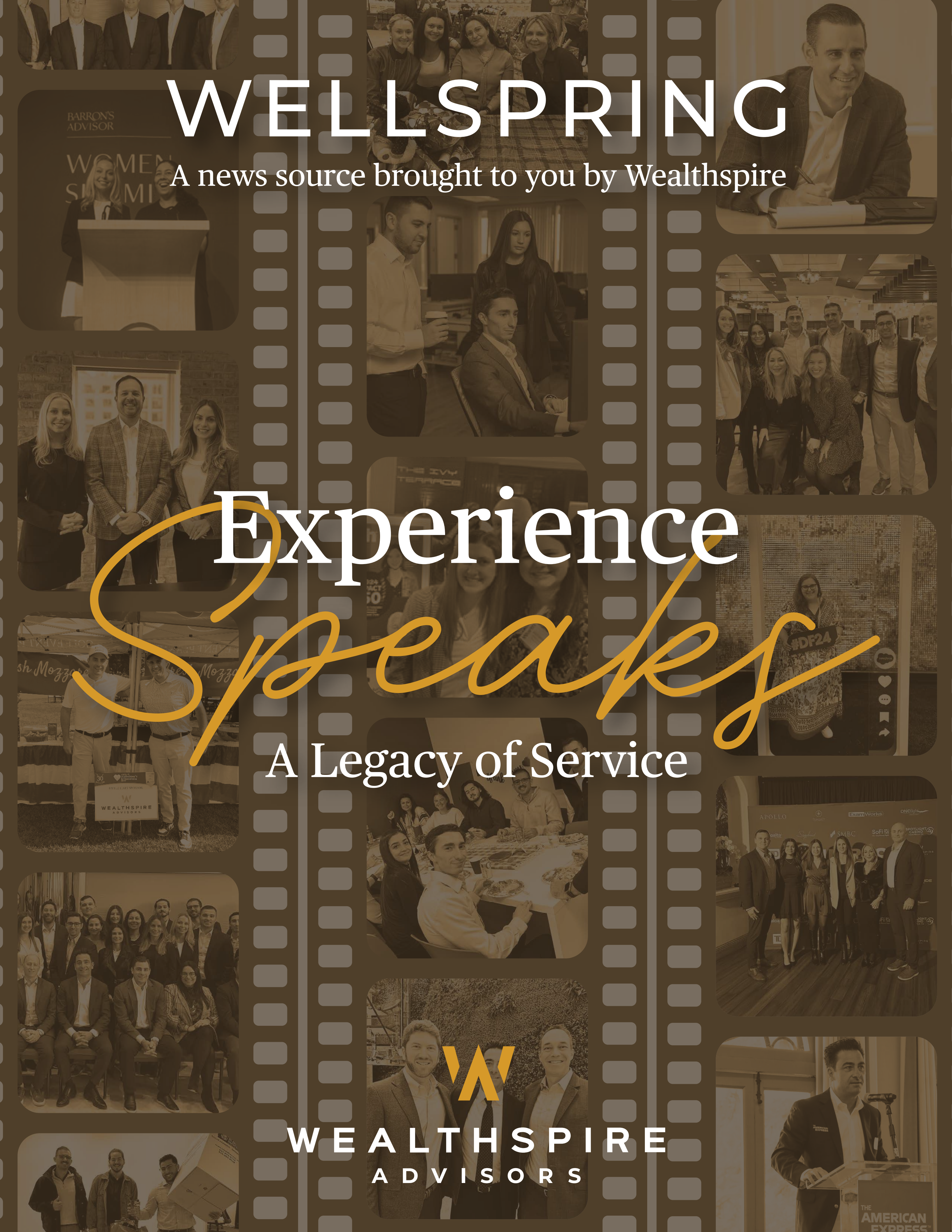
WELLSPRING

A news source brought to you by Wealthspire



Experience *Speaks*

A Legacy of Service

WEALTHSPIRE
ADVISORS

Wealthspire is comprised of a deep pool of talented team members.
Our clients are supported by a world-class investment team of 20+ people 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.

Total Employees: 370+	**Total CFP® Professionals:** 100+
Total Advisors: 120+	**Office Locations:** 20+

Total AUM:
$29.3 billion

Data in table above as of 12/31/2024 for Wealthspire Advisors LLC and its subsidiaries

Recognition*

Frank P. Marzano, Our Team's Founder

- Frank Marzano
  Barron's Top Individual Advisor 2024
- Frank Marzano
  Barron's Advisor Hall of Fame 2024
- Frank Marzano
  Forbes Best-in-State Wealth Advisor 2024
- 2024
  Barron's Top 1200 Financial Advisors (GM Advisory Group)
- SOUTH FLORIDA BUSINESS JOURNAL — 2024
  South Florida Business Journal – Best Places to Work

Wealthspire Firmwide Rankings

- 2024
  Forbes – America's Top RIA Firms
- 2024
  Barron's Magazine Top 50/100 RIAs
- 2024
  Financial Advisor Magazine – Top Registered Investment Advisors
- 2024
  Financial Advisor Magazine – Top 50 Fastest-Growing Firms
- USA TODAY — 2024
  USA Today – Best Financial Advisory Firms

*See final disclosures for more details on the awards listed above.

Dear Valued Clients,

As I celebrate with my team, an incredible milestone—20 years as an investment advisor, founder and business leader—I am filled with immense pride and gratitude. It's with great excitement that I share with you a momentous achievement: being inducted into the Barron's Hall of Fame for our industry. This recognition is not only a testament to our team's hard work and dedication but also a true reflection of the trust and loyalty you, our clients, have placed in us over the years.

The needs and future aspirations of you and your family have been the driving force behind our growth, innovation, and success. Our achievements have always been about building meaningful relationships and fostering long-lasting partnerships. We are proud to have had the privilege of working with you and being a part of your journey.

A large portion of our team has been with us for many years, demonstrating their strong dedication to both you and your family. Many have built their careers here over the past decade or more. Their loyalty to your family is embedded in everything they do, and they are deeply committed to serving you and supporting you in achieving your goals.

Our company culture is built on the understanding that we are always here for each other, and that commitment extends to everyone we serve, creating a sense of security and trust that is felt by all. I would also like to acknowledge our newest team members, who have integrated effortlessly into our tight-knit group. We are excited to embrace their fresh perspectives and unique skills.

In an era of constant change, we understand the power of trust, reliability, and continuity. The people you work with—their expertise, their knowledge of your needs, and their commitment to your success—are the same people you'll continue to work with. This is the value of the relationships we hold dear and will always prioritize.

Thank you for your partnership, your loyalty, and your belief in us.

Here's to the next 20 years and beyond!

With heartfelt gratitude,

Frank P. Marzano

Frank P. Marzano, CFP®, CPA
Managing Director

Reaching New Heights

Together

Left to right: Frank P. Marzano, CFP®, CPA, Managing Director and Michael J. LaMena, AIF®, CEPA , SHRM-SCP, Chief Executive Officer

Building a future on unified beliefs empowers us to reach new heights together, as shared values create a strong foundation for collective growth and progress. When we stand united in purpose, we inspire real innovation. Together, we can accomplish incredible things and look forward to the exciting possibilities that lie ahead.

"Joining Wealthspire has been an amazing journey for our team and clients. The collaboration and shared focus on delivering exceptional service have exceeded my expectations. It's exciting to see how our combined strengths are making a difference, and I look forward to all we'll achieve together in the future."

FRANK P. MARZANO

2024
Barron's Hall of Fame

MIKE LAMENA AND FRANK MARZANO'S INTERVIEW ON THE HALL OF FAME

It's been a little over a year since we announced that GM Advisory Group was joining Wealthspire, and there is still so much to celebrate. Michael LaMena and Frank Marzano sat down this week in our Boca Raton office to reflect on the journey so far. Frank shared how the partnership "has allowed us to spend a lot more time collaborating, a lot more time focusing on our clients."

A Conversation with Frank Marzano and Mike LaMena

Wealthspire at a Glance

We are an independent advisor committed to serving clients in a fiduciary capacity and currently oversee $29.3 billion in AUM.* Although our size means we have a variety of clients, we work most extensively with high net worth and ultra high net worth individuals and families.

Our Approach

- We aim to simplify lives by coordinating seamlessly with outside advisors and building our client teams around a collaborative structure.
- We lead with planning that is tailored to meet the goals and needs of our clients.
- We invest with a long-term approach that focuses on a disciplined strategy and avoids emotional decision-making.

Our Clients

- We specialize in high-income professionals, divorcees, recipients of inheritance, or others who may have received a large windfall and lack the time or operating experience to manage it themselves.
- Business owners rely on our expertise in corporate benefits, cash flow planning, and succession planning.
- Charitably-inclined clients rely on our work with family foundations and expertise in Donor Advised Funds.

Our Unique Capabilities

- Our dedicated wealth strategy team includes seasoned in-house estate attorneys who provide ongoing training, consultations with advisors, and are able to work directly with larger clients with highly complex estate strategies.**
- We work extensively with attorneys and executives, getting to know their distinct compensation packages and enabling them to fully capitalize on those benefits as part of a comprehensive financial plan.

Our People*

120+ ADVISORS backed by service teams and internal operations staff.

72% OF OUR ADVISORS are CERTIFIED FINANCIAL PLANNERS™.

Our staff carry over 25 credentials, **100+ CFP®** professionals, **10+ CFA®** charterholders, **15+ AIF®** designees, and **15+ JDs**.

* Reflects combined data as of 12/31/2024 for Wealthspire Advisors LLC and its subsidiaries.
** Wealthspire Advisors does not provide legal or tax advice, nor does it engage professionals on behalf of its clients.

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, we have branched out to 20+ additional offices and 370+ team members throughout the country to help meet you wherever you are. Find us at any of the locations on the map below.

Headquarters: 521 Fifth Avenue
15th Floor
New York, NY 10175

400 Broadhollow Road
Suite 301
Melville, NY 11747

150 East Palmetto Park Road
Suite 500
Boca Raton, FL 33432

Intentionality

Intentionality is key to creating a strong company culture geared toward providing the highest standard of service to our clients.

CORE VALUES

Our core values guide 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 what anyone might expect 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.

WEALTHSPIRE BELIEFS IN PRACTICE

INSPIRE

We value our people and invest in our team.

GO BIG

We fearlessly embrace opportunities to grow, serve more, and change lives.

OPEN UP

We demonstrate transparency, listen with an open mind, and share honestly.

SUCCEED TOGETHER

We purposefully collaborate without boundaries to deliver our best.

PURSUE BALANCE

We create a flexible environment where scale and efficiency complement uniqueness.

OWN IT

We own the path. We own the result.

Your Advice Team

A Small Team Specifically Assigned to You, Aligned with Your Goals

Each of our valued clients has their own Advice Team, part of our dedication to maintaining a small firm feel with big firm resources. Your Advice Team truly gets to know you and your family, helping you integrate your life plan with your finances.

You determine what you want your wealth to do for you. Your Advice Team is here to ask the right questions to gain a better understanding of the future you wish to create.

Left to right: Jared Wolfe, CPA, Sr. Associate Advisor; Christopher Castellano, CFP®, CPA, Managing Director; Juliana Gadaleta, Sr. Advisor Associate; Danielle Paganuzzi, Senior Vice President; Alexandria Nichols, Sr. Advisor Associate; Teddy Kramer, Advisor Associate; Andrew Frattaroli, FPQP®, Assistant Vice President

Left to right: Shannon Thieke, Advisor Associate; Elizabeth Sforza, Sr. Advisor Associate; Rosey Timoney, CFP®, Senior Vice President; Frank Lavrigata, CFP®, Managing Director; Michael Bueti, CFP®, Assistant Vice President; Michael Bongiorno, Advisor Associate; Alyson Woolbright, FPQP®, Sr. Advisor Associate

Left to right: Katarina Obermaier, FQPQ™, Sr. Advisor Associate; Charles Scarallo, CFP®, CPA, Managing Director; Lyndsey Gorham, Senior Vice President; Kristoffer Andersen, Sr. Advisor Associate; Taylor Stathis, CFP®, Senior Vice President

Left to right: Mariana Lombardi, Assistant Vice President; Patrick Wren, Managing Director; Carolina Llano, CFP®, Senior Vice President; Vincent Pecoraro, FPQP™, Advisor Associate. Not pictured: Nicholas Troy, Advisor Associate; Belle Bennet, Advisor Associate

Left to right: Belle Bennett, Advisor Associate; Michael J. Santo, Managing Director; Mariana Lombardi, Assistant Vice President. Not pictured: Taylor Stathis, CFP®, Senior Vice President; Michael Bueti, CFP®, Assistant Vice President

Our Core Service Offerings

For Every Circumstance

Understanding that each client is unique, we collaborate with you to create tailored solutions that address your specific needs, goals, preferences, and circumstances. Our services are driven by specialized teams in areas like 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.

Our Services Are Always Centered around Your Needs

- High-touch approach, ensuring personalized attention and support
- Proactive strategy, consistently anticipating and addressing your needs
- Comprehensive focus on all financial aspects for a holistic approach
- Customized solutions tailored to your specific circumstances and goals
- Dedicated to understanding and prioritizing your unique needs and objectives

Left to right: Charles Scarallo, CFP®, CPA, Managing Director; Patrick Wren, Managing Director; Christopher Castellano, CFP®, CPA, Managing Director; Frank Lavrigata, CFP®, Managing Director; Eric Bernstein, CAIA, Senior Vice President, Investments; Frank P. Marzano, CFP®, CPA, Managing Director; Michael J. Santo, Managing Director

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

Why Choose Wealthspire

Serving Families Beyond Investments

With considerable wealth comes the challenge of integrating all the services and experience needed to sustain it. Our goal is to make things clear, keep you informed, be one step ahead, and leave no stone unturned, Together, we establish a strategic plan that guides all of our recommendations.

We believe wealth should be managed with utmost care, accountability, and a deep understanding of your family's dynamics, values, and aspirations.

Here's how Wealthspire services differentiate us from the rest

COMPREHENSIVE WEALTH MANAGEMENT
Your Wealthspire team focuses on not only investments but also tax planning, estate planning, philanthropy, and intergenerational wealth transfer.

PERSONALIZED SERVICES
Whether you require assistance with investment management, risk assessment, family governance, or administrative support, our dedicated solutions team is here to provide you with tailored solutions that suit your family's financial requirements.

MULTIGENERATIONAL SUPPORT
It is crucial to prepare the next generation for financial success. We offer specialized educational programs, mentorship opportunities, and guidance to empower your family members in making informed financial decisions and maintaining a strong family legacy.

ACCESS TO TRUSTED NETWORKS
Our network of professionals, including legal advisors, tax specialists, and investment managers, allows us to provide you with select resources and opportunities that are right for you.

Spotlight on Comprehensive Services

Let us help you navigate the complexities of managing your family's financial future with confidence and ease.

Adapting to Evolving Needs: Our Expanded Suite of Comprehensive Services

As our clients' needs have evolved, we have adapted by developing and offering new services that go beyond the traditional scope. These services are designed to address the increasingly complex challenges our clients face in today's fast-paced and ever-changing landscape. Recognizing the demand for more tailored, strategic solutions, we have introduced comprehensive offerings that encompass not only core services but also a wider range of support, from advanced analytics to proactive problem-solving strategies. This expansion allows us to provide deeper insights, ensure continuous growth, and deliver results that align with each client's unique goals, positioning us as a trusted partner for both immediate and long-term success.

We have found that some families have a need for more extensive support, and for them we offer additional team assistance beyond our core services, including alternative investment due diligence and family office accounting, ensuring you receive the most thorough and personalized care possible.

Comprehensive Services: Family Office Accounting Services

BILL PAY

- Simplify, digitize, and automate
- Provide transparent vendor management
- Provide controlled, efficient transaction processing

REPORTING

- Provide financial statements
- Cash flow evaluation and analysis
- Monitor credit card activity
- Track charitable contributions and advise on tax-savings options

BUDGETING

- Develop a comprehensive, attainable budget
- Provide budget vs. actual detail
- Analyze trends to educate clients on spending habits

LIAISON WITH OUTSIDE PROFESSIONALS

- Orchestrate timely payments of taxes, provide financial reporting, and summarize taxable deductions
- Develop optimal entity structure for estate and business

HOUSEHOLD PAYROLL

- Set up payroll and process it accordingly
- Prepare and file W-2s and 1099s for household employees
- Ensure compliance with all federal and state mandates

"Our Family Office Services provide peace of mind with accurate, timely and secure support of all the details, saving you time to focus on other priorities. We take care of the daily tasks that can become overwhelming, ensuring that you're in trusted hands and everything is managed smoothly."

JOSH GOLDSMITH,
Vice President, Head of Family Office Accounting

Left to right: Ally Vecchione, CPA, Family Office Accounting Manager; Louis DeMarco, Family Office Accountant; Madison Khazzam, CPA, Sr. Family Office Accountant; Josh Goldsmith, CPA, VP Head of Family Office Accounting; Sneh Shah, CPA, Sr. Family Office Accountant; JD Kirby, Family Office Accountant; Not pictured: Alyssa Gadaleta, CPA, Sr. Family Office Accountant

Comprehensive Services:
Alternative Investments

Spotlight on Private Investments and Consulting Services

We know alternative investments can play an important role in any well-balanced client portfolio for whom it is suitable and may complement a traditional portfolio of stocks and bonds. For clients who hold private investments or have a large, concentrated position in family held businesses, having a resource to monitor and evaluate allocations can be highly valuable. It can lead to more active oversight, better decision-making, and ultimately a better chance for positive long-term outcomes versus a passive approach.

For this reason, the Wealthspire Investment Team has dedicated resources to perform due diligence on both fund managers and direct allocations to private market deals.

We work directly with clients as a due diligence resource in some of the following ways:

- **New Investment Due Diligence:** Analysis, research, findings and memos
- **Monitoring:** ongoing diligence, manager communications, valuation
- **Reporting:** Consolidation, portfolio construction, MOIC & IRR performance
- **Other Services:** Private fund or SPV operations, Family Office OCIO functions

ERIC BERNSTEIN, CAIA, SENIOR VICE PRESIDENT, INVESTMENTS, a Chartered Alternative Investment Analyst®, has 10 years of experience focusing solely on private equity, credit, and real estate transactions plus hedge fund strategies, across all sectors, industries, stages, and capital structures.

Eric plays an integral part in our ability to provide private investment and consulting services.

Behind the Scenes

Operations • Marketing • Administration • Advisor Technology

Our teams service professionals power the infrastructure essential for exceptional wealth management. We seamlessly manage complex trading, investment operations, portfolio oversight, and client requests, while delivering a premium experience for both clients and team members. Through a combination of advanced technology and personalized service, we enable advisors to focus on what matters most - their client relationships - supported by our thoughtful robust operational foundation.

Left to right: Madison O'Reilly, Office Coordinator; Kerry Bragg, Assistant Vice President, Client Operations; Melanie Conte, Sr. Executive Assistant; Danielle Siano, Marketing Manager; Spencer Weiss, Associate, Investments; Margaret Iamunno, Senior Vice President, Melville Office Lead; Natalie Sequeira, Sr. Associate, Advisor Technology; Angela Loffredo, Assistant Vice President Client Operations; John Green, Associate, Data Operations

Pictured: Angela Loffredo, Assistant Vice President, Client Operations

inSPIRE AWARDS

Congratulations, Angela on your firm-wide recognition for your exceptional performance and invaluable contributions. She has a remarkable ability to build strong relationships with her team members, fostering a collaborative and positive work environment. Angela consistently delivers high-quality work, improving our process management and driving greater efficiency across the organization. Her focus on service innovation also promotes collaboration, enhancing our team's collective intelligence.

Pictured: Angela Loffredo

Collective Intelligence

Familiar Faces

We pride ourselves on fostering a strong family culture, where long-lasting relationships are at the heart of everything we do. Many of our team members have been with us for over 10 years, with most having spent their entire careers here. This enduring loyalty has allowed our team to grow together and establish deep, meaningful connections with both our clients and each other. We believe these long-term relationships are a testament to the trust and dedication we have built over the years, creating an environment where everyone truly understands and supports one another.

Our clients and team members alike are familiar faces, and, over time, we have become like a family. We are honored to have team members who feel a deep sense of commitment to our clients and their families, going above and beyond to ensure their needs are met. This connection is central to our approach, as we not only understand the professional needs of our clients but also care deeply about their well-being. Our company culture is built on the understanding that we are always here for each other, and that commitment extends to everyone we serve, creating a sense of security and trust that is felt by all.

20 Years of Service as a Team
Our Milestones

20 YEARS

Frank Marzano, CFP®, CPA, Managing Director

15+ YEARS

Lyndsey Gorham

Frank Lavrigata

Danielle Siano

10+ YEARS

Christopher Castellano

Rosey Timoney

5+ YEARS

Margaret Iamunno

Charles Scarallo

Danielle Paganuzzi

Melanie Conte

Kerry Bragg

Brian McAuliffe

Patrick Wren

Michael Bueti

Eric Bernstein

Elizabeth Sforza

Taylor Stathis

Frank Balas

Collective Intelligence

New Hires

We are thrilled to welcome our new team members who have joined our family. Each new hire brings fresh perspectives and unique skills, but what truly sets them apart is how well they align with our company culture. We are excited to have them onboard, as they fit seamlessly into our close-knit team, where collaboration, commitment, and care for our clients are at the core of everything we do.

Welcome, new hires!

BELLE BENNETT
Advisor Associate

Belle serves as an Advisor Associate in our Boca Raton, FL office, supporting the local advisory team throughout the financial planning process, assisting with building investment strategies and managing client relationships. Belle prides herself on being detail-oriented and is deeply committed to continuously learning from those around her.

NICHOLAS TROY
Advisor Associate

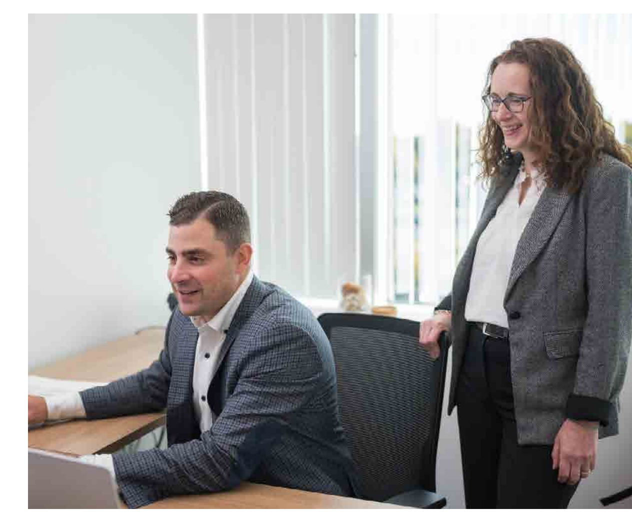
Nick is an Advisor Associate based in Melville, NY, working closely with the local team of advisors, as well as those in the New York City office. In this role, he assists throughout the financial planning process, helps devise investment strategies, and manages client relationships.

ALYSSA GADALETA, CPA
Senior Family Office Accountant

Alyssa is a Senior Family Office Accountant based in our Melville, NY office and works closely with our NYC and Boca Raton, FL teams. Her work with the family office services team is driven by her passion for creating data efficiencies.

Built Like a Team, **Bonded Like a Family**

At Wealthspire Advisors, our team is like a family. We thrive on the camaraderie we share, both among ourselves and with those we serve. It is always special when team members from all three of our GM East locations, Melville, NYC and Boca Raton, come together. Whether we're collaborating on projects or celebrating milestones, we genuinely enjoy being together. This sense of unity and mutual respect is at the heart of our company culture, making Wealthspire a place where everyone feels valued and supported.



Wealthspire in the Mix

At the table with the **brightest minds**

FRANK BALAS FEATURED IN INVESTMENT NEWS

Technology driving tailored portfolio approach

In an evolving financial landscape, there is no one-size-fits-all approach to financial planning. Frank Balas, VP of Investments at Wealthspire Advisors, emphasizes the importance of tailored strategies that align with individual client objectives and risk tolerances.

Stressing the importance of the right combination of advanced technology and personalized portfolios, Frank shares insights on navigating tricky markets and understanding economic cycles.

CLICK HERE TO READ ARTICLE

CHRIS CASTELLANO PERSHING NEXT LEADERSHIP FORUM TWO-YEAR PROGRAM

Managing Director, Chris Castellano, CFP®, CPA, was chosen to participate in the BNY Pershing Team Next Leadership Forum, their inaugural professional development program for emerging leaders. This group consists of 21 individuals from across the country, all with a shared vision to connect future leaders, exchange knowledge, and enhance their ability to lead a top-performing RIA by fostering stronger relationships.

AUTHORSHIP - JULIANA GADALETA

Senior Advisor Associate, Juliana Gadaleta shared her deep analysis of the potential tax policy scenarios for each presidential candidate in November 2024 and their implications for wealth management. Her detailed examination provided clients with valuable insights for their financial planning strategies. This thoughtful analysis exemplifies Wealthspire's commitment to thought leadership and delivering premier service to our clients.

CLICK HERE TO READ ARTICLE

BARRON'S WOMEN SUMMIT

Mariana Lombardi, Assistant Vice President, Alexandria Nichols, Sr. Advisor Associate and Belle Bennett, Advisor Associate had an inspiring and empowering experience attending the 2024 Barron's Advisor Women Summit in Palm Beach, Florida. They each had the opportunity to network with industry leaders and gain insights into the growing importance of alternative investments to achieve better outcomes for our clients. The three were able to divide and conquer and attend various sessions and hear from cutting edge female advisors who are succeeding in the industry.

Left to right: Alexandria Nichols, Advisor Associate; Mariana Lombardi, Assistant Vice President Advisor; Belle Bennett, Sr. Advisor Associate

Left to right: Belle Bennett, Advisor Associate; Alexandria Nichols, Sr. Advisor Associate

WORTH EVENT MAGAZINE LAUNCH

We celebrated the diverse companies on *Worth Magazine's* Q3 Impact 150 list at Worth Media's NYC headquarters. The event honored organizations committed to the UN's Sustainable Development Goals and fostered connections among passionate changemakers.

Left to right: Sr. Advisor Associates Alyson Woolbright, FPQP® and Katarina Obermaier, FPQP®

DREAMFORCE

Natalie Sequiera, Sr. Associate, Advisor Technology had the incredible opportunity to attend Dreamforce 2024, where she was able to connect with numerous Salesforce experts from all over the world. She returned from San Francisco with a wealth of knowledge and insights on how Salesforce is integrating AI.

Pictured: Natalie Sequeira, Sr. Associate, Advisor Technology

Wealthspire Good Works

Our ongoing commitment **to community**

THE AMERICAN EXPRESS PGA GOLF TOURNAMENT AND IMPACT THROUGH GOLF FOUNDATION

Wealthspire had a fantastic experience at this year's AmEx PGA Tournament. The tournament's growth has been remarkable, contributing millions of dollars to nonprofit organizations dedicated to supporting Coachella Valley residents since 1960.

Frank Marzano is also chairman of the Impact Through Golf Foundation, a charity that strives to provide funding to organizations that support health and wellness, youth sports, families, education, and homelessness. Frank's involvement took the event to new heights as he, in collaboration with AMEX, presented $1,000,000 to 16 Coachella Valley charities at the La Quinta Country Club in California.

LEARN MORE ABOUT **AMERICAN EXPRESS™ IMPACT THROUGH GOLF FOUNDATION**

LONG ISLAND ALZHEIMER'S AND DEMENTIA CENTER GOLF OUTING

Charles Scarallo, CFP®, CPA and Frank Lavrigata take part in the Long Island Alzheimer's and Dementia Center Golf Outing to demonstrate their commitment to improving the quality of life and well-being of individuals and families affected by Alzheimer's disease, related memory disorders, and their caregivers.

LEARN MORE ABOUT **LONG ISLAND ALZHEIMER'S AND DEMENTIA CENTER**

Left to right: Frank Lavrigata, CFP®, Managing Director; Charles Scarallo, CFP®, CPA Managing Director

SMILE FARMS: GROWING TOGETHER GALA

We are proud to support Smile Farms and volunteer each year, offering our help in the gardens across Long Island, New York. In December, our team attended the annual gala, which brought together supporters to discuss the organization's progress and the impact it has had on people's lives. Smile Farms is a nonprofit dedicated to creating jobs and fostering a meaningful community for adults with developmental disabilities.

LEARN MORE ABOUT **SMILE FARMS**

Left to right: Ally Vecchione, CPA, Family Office Accounting; Lyndsey Gorham, Senior Vice President

Left to right: Lyndsey Gorham, Senior Vice President; Ally Vecchione, CPA, Family Office Accounting

As long-time supporters of Smile Farms, we are excited to announce that Charles Scarallo, CFP®, CPA, Managing Director, has been nominated to join the Board of Directors as Treasurer. In this role, he will provide financial oversight, leveraging his expertise to shape the financial strategy that supports Smile Farms' mission and vision.

TUNNELS TO TOWERS

Our team at Wealthspire continues to support the Tunnel to Towers Foundation in an effort to support veterans who have dedicated their lives to defending our freedoms and upholding our values. Veterans represent courage, resilience, and dedication. By extending our hand in support, we are not only honoring their sacrifices but also recognizing the importance of assisting them as they transition in civilian life.

LEARN MORE ABOUT **TUNNELS TO TOWERS**

FEEDING AMERICA

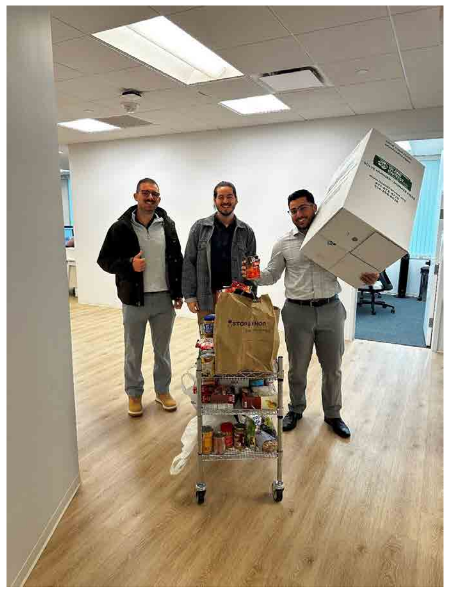
Wealthspire has teamed up with Feeding America for a December fundraiser aimed at fighting food insecurity. Each region participated competitively, helping to boost awareness and engagement. Wealthspire matched the first $15,000 raised by each region.

As a result, we have collectively made a meaningful difference in the lives of those affected by food insecurity.

LEARN MORE ABOUT **FEEDING AMERICA**

Wealthspire Good Works

Our ongoing commitment
to community



Left to right: Louis DeMarco, Family Office Accountant; JD Kirby, Family Office Accountant; Michael Bongiorno, Advisor Associate

Pictured: Louis DeMarco, Family Office Accountant, bringing in food donations to Island Harvest warehouse in Melville

ISLAND HARVEST

We have always believed in the power of giving back and making a positive impact where we live and work. Recently, our team had the privilege of participating in Island Harvest's Turkey & Trimmings Collection Campaign, which brings people together to provide food for thousands of families in need.

LEARN MORE ABOUT **ISLAND HARVEST**

SUFFOLK SIGNATURE EVENT UJA FEDERATION

Charles Scarallo CFP®, CPA, Managing Director and Taylor Stathis, Senior Vice President join the Suffolk Signature event hosted by the UJA. The UJA is an organization dedicated to fostering Jewish inclusivity by uniting diverse Jewish voices on shared causes. Through its efforts, UJA brings together individuals from different backgrounds and perspectives, working collaboratively to address key issues that affect the Jewish community, creating jobs and fostering a meaningful community for adults with developmental disabilities.

LEARN MORE ABOUT **UJA FEDERATION**

Left to right: Charles Scarallo CFP®, CPA, Managing Director and Taylor Stathis, Senior Vice President with their spouses.

WEALTHSPIRE SPREADS HOLIDAY CHEER WITH PROJECT TOY

This holiday season, Wealthspire Advisors teamed up with the Family Service League's Project Toy initiative. We purchased items from the League's Amazon Wishlist and visited their Huntington, NY location to wrap presents and ensure local families have a happy holiday season.

LEARN MORE ABOUT **PROJECT TOY**

Left to right: Kerry Bragg, Assistant Vice President, Client Operations; Madison O'Reilly, Office Coordinator; Madison Khazzam, Sr. Family Office Accountant; Ally Vecchione, CPA, Family Office Accounting Manager

Pictured: Kerry Bragg wrapping a gift for a local family at the Family Service League in Huntington, NY

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

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

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.

WELLSPRING

A news source brought to you by Wealthspire

Keeping You in the Know

***WELLSPRING* is our client-oriented digital news source where we curate the latest in Wealthspire thought leadership, events, and updates contributed by our team of professionals and other innovative thinkers.**

WELLSPRING MAGAZINE

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

WELLSPRING COMMUNICATIONS

Wealthspire's hand-curated lineup of quality content, which is emailed to you, is designed to keep you abreast of the latest news and ideas on the topics that matter.

INVESTMENT PERSPECTIVES

Investment opportunities are constantly evolving alongside changing economic conditions. As a result, we believe 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.

WEALTH STRATEGIES

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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Recognition, page 2

Frank Marzano, Barron's Top Individual Advisor 2024: *Awarded September 13, 2024 , based on data as of 6/30/2024.*
Frank Marzano, Barron's Advisor Hall of Fame 2024: *Awarded September 13, 2024 , based on data as of 6/30/2024.*
Frank Marzano, Forbes Best-in-State Wealth Advisor 2024: *Awarded April 2024, based on data as of 06/30/2023.*
Frank Marzano, Barron's Top 1200 Financial Advisors (GM Advisory Group): *Awarded September 13, 2024 , based on data as of 6/30/2024.*
South Florida Business Journal – Best Places to Work: *Awarded September 13, 2024 , based on data as of 6/30/2024.*
Forbes – America's Top RIA Firms: *Ranking published October 2024, based on values as of March 31, 2024.*
Barron's Magazine Top 50/100 RIAs: *Published September 13, 2024, based on data as of June 30, 2024. The ranking is based on assets managed, growth, technology spending, succession planning, and other metrics. There was no charge to be included in this award listing. In 2019, 50 firms from throughout the United States were selected for this award. Award was expanded to feature Top 100 firms in 2020 using the same criteria.*
Financial Advisor Magazine – Top Registered Investment Advisors: *Published July 12, 2024, based on data from December 2022-December 2023.*
Financial Advisor Magazine – Top 50 Fastest-Growing Firms: *Published July 12, 2024, based on data from December 2022-December 2023.*
USA Today – Best Financial Advisory Firms: *Published April 23, 2024, based on market research from Statista for 2022-2023.*

For more on our awards and recognition, visit https://www.wealthspire.com

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