



WEALTHSPIRE
ADVISORS

ACG ADVISORY SERVICES, LLC
dba WEALTHSPIRE ADVISORS
Part 2B Brochure Supplement

Corporate Office:

1640 Huguenot Road

Midlothian, VA 23113

www.wealthspire.com

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This Brochure Supplement provides information about Registered Investment Advisor Representatives of ACG Advisory Services, LLC dba Wealthspire Advisors. It supplements the accompanying Form ADV brochure. Please contact Wealthspire Advisors' Chief Compliance Officer at 414.509.1330 if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document.

Additional information about each representative is also available on the SEC's website at www.adviserinfo.sec.gov.

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Michael LaMena, AIF^{®1} Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. LaMena was born in 1973. He received his Bachelor of Arts degree in English from the University of Notre Dame in 1995.

Mr. LaMena has over 20 years' experience building, operating, and leading global wealth management organizations. He began his career in 1995 with a year of service as a volunteer high school teacher at Mount St. Michael Academy in the Bronx, NY. Mr. LaMena then started his 14-year tenure at Morgan Stanley & Co., where he served as Executive Director of Private Wealth Management Operations in New York, as well as Executive Director of Private Wealth Management for Asia in Hong Kong. Next, he spent 7 years at HighTower, serving as Chief Operating Officer and later as President, playing an instrumental leadership role in scaling that business from a start-up organization to a nationally recognized financial services firm with more than \$50 billion in assets and more than 600 employees. Mr. LaMena joined Wealthspire Advisors' predecessor company, Bronfman Rothschild, as President and Chief Operating Officer in September 2017 and assumed the role of Chief Executive Officer in May 2019.

Mr. LaMena holds the Accredited Investment Fiduciary[®] designation.

Disciplinary Information

Mr. LaMena does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. LaMena is the Chief Executive Officer of Wealthspire Advisors LLC and its subsidiaries, all separately registered investment advisers and subsidiary companies of NFP Corp., an Aon company.

Additional Compensation

Mr. LaMena does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. LaMena's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Eric Sontag, CFA^{®2} Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Sontag was born in 1983. He received his Bachelor of Arts degree in Economics and Sociology, with distinction, from Cornell University in 2005.

Mr. Sontag worked at BlackRock from 2005 until 2009 in two different roles focused on investment risk analysis and reporting, first as a Financial Analyst with the Portfolio Analytics Group in New York and later as an Associate with the Transition Management Team in London. Mr. Sontag joined one of Wealthspire Advisors' predecessor firms, Sontag Advisory LLC, in November 2009. He served as its Chief Operating Officer beginning in 2011 and assumed the additional role of President in 2018.

Mr. Sontag holds the Chartered Financial Analyst[®] designation.

Disciplinary Information

Mr. Sontag does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Sontag is the President and Chief Operating Officer of Wealthspire Advisors LLC and its subsidiaries, all separately registered investment advisers and subsidiary companies of NFP Corp., an Aon company.

Additional Compensation

Mr. Sontag does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Sontag's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Hoyt Stastney, J.D. Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Stastney was born in 1972. He received his Bachelor of Arts degree in Political Science, History and Latin from the University of North Dakota in 1993. He received his Juris Doctor from the University of Minnesota Law School in 1997.

Mr. Stastney was an equity partner and attorney in the Milwaukee office of the national law firm Quarles & Brady LLP, a firm he joined in 1997. He joined Wealthspire Advisors' predecessor company, Bronfman Rothschild, in April 2016 as General Counsel, and he assumed the additional responsibility of Chief Compliance Officer from January 2017 to January 2020. He now serves as the General Counsel and Head of Mergers & Acquisitions for Wealthspire Advisors.

Disciplinary Information

Mr. Stastney does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Stastney is the General Counsel, Head of Mergers & Acquisitions, and Managing Director of Wealthspire Advisors LLC and its subsidiaries, all separately registered investment advisers and subsidiary companies of NFP Corp., an Aon company. Mr. Stastney is also a member of the Board of Directors of RueOne Investments LLC, an unaffiliated private equity firm located in New York City.

Additional Compensation

Mr. Stastney does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Stastney's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Michael Del Priore Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Del Priore was born in 1981. He graduated from Loyola University Chicago in 2003 with a Bachelor of Business Administration degree in Information Systems.

Mr. Del Priore has more than 20 years' experience in the financial services industry. He began his career as a Clerk and then a Specialist at Rock Island Equity Market Services at the Chicago Stock Exchange. He then moved to the National Stock Exchange as a Market Analyst (2006-2007), an Examiner (2007-2010), and a Senior Examiner (2010-2013). Prior to joining Wealthspire Advisors' predecessor company, Bronfman Rothschild, Mr. Del Priore spent 2 years at Raymond James & Associates as a Compliance Analyst & Auditor and then 4 years at LPL as a Compliance, Legal & Risk Examiner. He joined Bronfman Rothschild in June 2018 in the Legal and Compliance Department, where he has held several roles with increasing responsibility – first as Associate Compliance Officer, then Director, Legal & Compliance, next as Vice President, Legal & Compliance, and finally as Chief Compliance Officer.

Mr. Del Priore has successfully passed the Series 66 Uniform Combined State Law Examination.

Disciplinary Information

Mr. Del Priore does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Del Priore is the Chief Compliance Officer and a Senior Vice President at Wealthspire Advisors LLC and its subsidiaries, all separately registered investment advisers and subsidiary companies of NFP Corp., an Aon company.

Additional Compensation

Mr. Del Priore does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors. Accordingly, Mr. Del Priore has or shares direct or indirect supervisory authority over all of the firm's advisory personnel, including himself. Mr. Del Priore's activities are monitored by Hoyt Stastney, General Counsel. Mr. Stastney can be reached at 608.416.4410.

Joseph Saunders Wiggins, CFP®³, AIF®¹ Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Wiggins was born in 1965. He received his Bachelor of Finance degree from the University of North Carolina-Greensboro Bryant School of Business and Economics in 1988. He began his 35-year tenure as a consultant in 1988 with Actuarial Consulting Group, Inc., where he later served as President for Actuarial Consulting Inc. and ACG Advisory Services since 1998. He led the management team for both firms and provided comprehensive wealth management, investment advisory, and qualified plan consulting services for ACG Advisory Services and Actuarial Consulting Group, Inc. Mr. Wiggins also served as the CEO for ACG Advisory Services, Wealthspire Advisors' predecessor company, since 1998, before assuming the role of Managing Director in July 2023.

Mr. Wiggins is a CERTIFIED FINANCIAL PLANNER™ practitioner and holds the Accredited Investment Fiduciary® designation. He has successfully passed the Series 65 Uniform Investment Adviser Law Examination.

Disciplinary Information

Mr. Wiggins does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Wiggins is a board member of the Cameron Gallagher Foundation. He joined the foundation in January 2014. The Cameron Gallagher Foundation is a non-profit 501(c)(3) organization that promotes the awareness of teen depression and anxiety. This is not an investment-related activity and is not performed during trading hours.

Mr. Wiggins is a Managing Director at Wealthspire Advisors.

Additional Compensation

Mr. Wiggins does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Wiggins' investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Robert Moyer, CFA^{®2}, CAIA⁴, CFP^{®3} Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Moyer was born in 1981. He received his Bachelor of Kinesiology with a concentration in Sports Management and a Minor in Business degree from James Madison University in 2004.

Mr. Moyer was a Financial Service Advisor for First Market Bank from 2006-2007. He joined Wealthspire Advisors' predecessor company, ACG Advisory Services, in 2007 as Senior Portfolio Manager and Director of Research until 2019 in which he was named Chief Investment Officer. He now serves as an Advisor for Wealthspire Advisors.

Mr. Moyer is a CERTIFIED FINANCIAL PLANNER[™] practitioner, holds the CHARTERED FINANCIAL ANALYST[®] certification, and holds the Chartered Alternative Investment Analyst Association designation. He has successfully passed the Series 63 Uniform Securities Agent State Law Examination and the Series 65 Uniform Investment Adviser Law Examination.

Disciplinary Information

Mr. Moyer does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Moyer is currently an Advisor with Wealthspire Advisors.

Additional Compensation

Mr. Moyer does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Moyer's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Michael Moriarty Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Moriarty was born in 1970. He graduated, *cum laude*, from Davidson College in 1992 with a Bachelor of Arts degree in History. He graduated from the Fletcher School at Tufts University in 1997 with a Master of Arts in Law and Diplomacy, in the field of study of International Economics.

From 2000 to 2008, Mr. Moriarty was a Senior Managing Director and Global Head of the Hedge Fund Linked Business for Bear Stearns. He then spent a year at J.P. Morgan as Managing Director and Head of the Hedge Fund Linked Business for the Americas before working for Citadel LLC's Surveyor Capital unit as its Chief Operating Officer from 2009 to 2012. He served as Head of Investment Platform for Dynasty Financial Partners from 2013 to June 2017 before joining Wealthspire Advisors' predecessor company, Sontag Advisory LLC, in July 2017 as Chief Investment Officer.

Disciplinary Information

Mr. Moriarty does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Moriarty is the Chief Investment Officer at Wealthspire Advisors LLC and its subsidiaries, all separately registered investment advisers and subsidiary companies of NFP Corp.

Additional Compensation

Mr. Moriarty does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Moriarty's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Jacob Scott Biographical Information

Branch Location: 1640 Huguenot Road, Midlothian, VA 23113

Educational Background and Business Experience

Mr. Scott was born in 1987. He graduated from Niagara University with a Bachelor of Art degree in Communications and Minors in English and Writing Studies in 2009.

Mr. Scott worked for ESL Federal Credit Union as a Financial Service Representative from 2017-2018 prior to joining Paychex as a Retirement Sales Representative, in which he served from 2018-2019. He also was a Licensed Personal Banker for Wells Fargo from 2019-2021. In 2021 he joined AIG Retirement Services as a Retirement Plan Consultant prior to joining Wealthspire Advisors predecessor firm, ACG Advisory Services Inc., in 2022.

Mr. Scott has successfully passed the Series 65 Uniform Investment Adviser Law Examination.

Disciplinary Information

Mr. Scott does not have any disciplinary information to disclose. He has not: (a) been party to a criminal or civil action in a domestic, foreign, or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

Other Business Activities

Mr. Scott is currently a Senior Advisor Associate with Wealthspire Advisors.

Additional Compensation

Mr. Scott does not receive any additional economic benefit from third parties for providing advisory services.

Supervision

Michael Del Priore is the Chief Compliance Officer for Wealthspire Advisors and is responsible for supervision of Mr. Scott's investment advisory activities to ensure compliance with regulatory and internal procedures. His contact information is available on the cover page of this brochure.

Professional Designations

¹Accredited Investment Fiduciary® designation or the AIF® mark:

The Center for Fiduciary Studies owns the mark AIF®, which it awards to individuals who successfully complete initial and ongoing accreditation requirements.

The Accredited Investment Fiduciary® or AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, financial professionals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor, and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF® Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC.

²Chartered Financial Analyst® designation or the CFA® mark:

CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

The Chartered Financial Analyst® or CFA® charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute, the largest global association of investment professionals.

To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as member; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders, often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 19 countries recognize the CFA charter as proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investment, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

³CERTIFIED FINANCIAL PLANNER™ certification or the CFP® mark:

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with plaque design) in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

The CFP® certification is granted by the CFP Board. The certification is voluntary; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least three years of full-time financial planning-related experience (or equivalent, measured as 2,000 hours per year); and

- Ethics - Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics - Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interest of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

⁴Chartered Alternative Investment Analyst (CAIA):

The CAIA Charter, recognized globally, is administered by the Chartered Alternative Investment Analyst Association and requires a comprehensive understanding of core and advanced concepts regarding alternative investments, structures, and ethical obligations. To qualify for the CAIA Charter, finance professionals must complete a self-directed, comprehensive course of study on risk-return attributes of institutional quality alternative assets; pass both the Level I and Level II CAIA examinations at global, proctored testing centers; attest annually to the terms of the Member Agreement; and hold a US bachelor's degree (or equivalent) plus have at least one year of professional experience or have four years of professional experience. Professional experience includes full-time employment in a professional capacity within the regulatory, banking, financial, or related fields. Once a qualified candidate completes the CAIA program, he or she may apply for CAIA membership and the right to use the CAIA designation, providing an opportunity to access ongoing educational opportunities.

⁵NRS Investment Adviser Certified Compliance Professional (IACCP®):

The NRS Investment Adviser Certified Compliance Professional (IACCP®) designation is awarded to knowledgeable, experienced individuals who complete an instructor-led program of in-person and/or online study, pass a certifying examination, and meet its work experience, ethics, and continuing education requirements. The designation signifies intermediate-level knowledge of investment adviser regulation and compliance best practices, and adherence to nationally recognized professional standards and ethical leadership.

Exhaustive certification and course development, together with expert instructors and facilitators from the compliance, legal, regulatory, financial industry, and academic sectors, help ensure that individuals earning the IACCP® designation have been trained, tested, and certified to meet high industry professional standards.