

# Wealthspire Advisors

*is a proud TANGO Partner*

**Services:** Investment Management & Financial Services



**WEALTHSPIRE**  
ADVISORS

**Wealthspire Advisors** serves the investment management needs of endowments, foundations and charitable organizations by drawing on our broad wealth planning and management experience, robust technology platform and research resources. As a fiduciary, our independent investment management approach allows us to act solely in the best interest of your organization to deliver unbiased, objective financial solutions.

As a nonprofit organization, your endowment has a unique mission and is committed to serving the community for years to come. At Wealthspire Advisors, we know how to help your organization with the stewardship of

your financial resources. You can rely on the unbiased guidance from our independent investment management approach, which allows us to act solely in the best interests of your organization to serve as your long term financial partner.

## SPECIAL SAVINGS FOR TANGO MEMBERS

- In-depth initial client consultations, free of charge
- Negotiated, competitive fee arrangements
- Thorough analysis or development of your organization's investment charter, policy statement and spending policy, setting the foundation for underlying asset allocation
- Ongoing investment monitoring against performance standards with detailed reporting capabilities

**TANGO Region Served:**  
*Nationwide*

## CONTACT INFORMATION

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