

# Wealthspire Advisors

*is a proud TANGO Partner*

**Services:** Investment Management & Financial Services



# WEALTHSPIRE

## ADVISORS

**Wealthspire Advisors** is an independent advisor committed to serving clients in a fiduciary capacity and currently oversee more than \$25 billion in Assets Under Management.\* Our team has decades of experience partnering with Endowments and Foundations to help you invest with a long-term approach that focuses on a disciplined strategy, optimal portfolio construction, and performance reporting that helps further your organization's mission.

At the heart of your organization is its purpose. We have the experience and capability to establish clarify and incorporate an investment strategy that aligns with your organization's mission. Our firm specializes in small and mid-size Endowments and Foundations that have modest in-house resources and a need for minimizing operational costs. We aim to simplify your organization by helping establish key objectives, long-term growth, and capital preservation needs.

## CONTACT INFORMATION

### Wealthspire Advisors

29 South Main St. (Suite 300)  
West Hartford, CT 06107

**Contact:** Benjamin D. Kille

**Phone:** (860) 561-1162 Ext. 1842

**Email:** ben.kille@wealthspire.com

**Contact:** Amy B. Miller

**Phone:** 860-561-1162 Ext. 1937

**Email:** amy.miller@wealthspire.com

**Website:** www.wealthspire.com

## KEY SERVICES

- Investment Management
- Investment Committee Governance
- Investment Committee Education
- Investment Policy Statement creation and implementation
- Asset Allocation and Portfolio Construction
- Fee Analysis

## SPECIAL SAVINGS FOR TANGO MEMBERS

- Competitive fee structure
- Thorough analysis or development of your organization's Investment Policy Statement and spending policy, setting the foundation for underlying investment strategy
- Ongoing investment monitoring against performance standards with detailed reporting capabilities

### TANGO Region Served: *Nationwide*

Wealthspire Advisors is the common brand and trade name used by Wealthspire Advisors LLC and its subsidiaries, separately registered investment advisers and subsidiary companies of NFP Corp.

Wealthspire Advisors and TANGO have entered into an agreement pursuant to which Wealthspire Advisors pays an annual fee and TANGO promotes Wealthspire Advisors as a preferred service provider for TANGO Members. TANGO is not a current client of Wealthspire Advisors. The compensation paid by Wealthspire Advisors creates an incentive for TANGO to recommend Wealthspire Advisors, which creates a material conflict of interest.

©2024 Wealthspire Advisors.

\*As of 12.31.2023