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 $28.98 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.

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

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**Reflects combined AUM as of 9.30.2024 for Wealthspire Advisors LLC and its subsidiaries*