



ASPIRIANT

Aspiriant Names Four New Partners Across San Francisco and Los Angeles Offices

LOS ANGELES (May 5, 2026) – Aspiriant, a leading independent wealth management firm, has announced the addition of four new partners to its ownership group. As the registered investment advisor (RIA) industry continues to evolve, Aspiriant’s 100% independent employee ownership model aligns the interests of clients and employees, allowing the firm to make objective decisions and serve multigenerational families over the long-term.

The new members of Aspiriant’s partner group have a strong track record of helping clients achieve their long-term financial goals, including financial planning, investment management, tax services, estate planning and philanthropy.

The four new partners include:

Laurie Flenner - Director in Engagement and Talent Development (Los Angeles)

Gretchen Hollstein, CFP® - Director in Wealth Management (San Francisco)

Mohammad “Mo” Rouzegarian, MSc, EA - Senior Manager in Tax Services (Los Angeles)

Lydia Walz, CFP® - Senior Manager in Wealth Management (San Francisco)

“As a 100% employee-owned firm, we are excited to welcome four new partners,” said Rob Francais, co-founder and chief executive officer of Aspiriant. “Our new partners embody Aspiriant’s values and continue to help us break the mold in the wealth management industry. We strive to leverage our employee ownership and sustainable business model to best serve our clients.”

About Aspiriant

Aspiriant is a leading independent wealth management firm in the U.S. with more than \$17 billion of assets under management and advisement. The firm provides a full range of wealth management services for more than 2,200 individuals and families across the country with offices in Los Angeles, San Francisco, Silicon Valley, San Diego, Orange County, New York, Minneapolis, Milwaukee, Cincinnati and Austin. For more information, visit [aspiriant.com](https://www.aspiriant.com).