



ASPIRIANT

# Wealth Management Firm

## Aspiriant Adds Four Partners in 2020

*The newest partners bring a wide range of experience to serve clients and lead the firm into the future.*

**Los Angeles, CA, June 5, 2020:** Aspiriant, a leading independent wealth management firm that manages approximately \$12 billion in assets, announced today that four new partners in Los Angeles, San Francisco and Milwaukee have been voted into the owner group by the existing partners. These exceptional individuals exemplify Aspiriant's mission to transform the wealth management industry by remaining durably independent and objective, with a hard-wired succession model and 100 percent employee ownership.

Aspiriant's newest partners are:

**Mindy Tankel**, CFP® — Manager, Wealth Management (Los Angeles)

**Orin Winick** — National Director, Investment Advisory (Los Angeles)

**Michelle Nguyen**, CFA, CFP® — Manager, Wealth Management (San Francisco)

**Corey Mader**, CFA — Manager, Wealth Management (Milwaukee)

"It is truly gratifying to see these talented individuals rise to the partnership level," said Aspiriant Chief Executive Officer Rob Francais. "I am confident that Orin, Mindy, Michelle and Corey will uphold Aspiriant's mission to remain independent while continuously improving the firm's capabilities and exceeding the customer service expectations of our clients."

As a firm, Aspiriant is designed to outlast its advisors and partners to meet the needs of multiple generations of clients. Currently, the firm has approximately 200 team members, 72 of whom are owners. This sustainable employee ownership model eliminates the pressures to sell financial products or cater to outside firms with interests other than serving clients. Partners and advisors at Aspiriant are guided by their values and client-centric mindset.

### About Aspiriant

Aspiriant is a leading independent wealth management firm in the U.S. with more than \$12 billion of assets under management and advisement. The firm provides a full range of wealth management services for over 1,700 individuals, families and institutions throughout the country with offices in Los Angeles, San Francisco, Silicon Valley, San Diego, Orange County, New York, Boston, Minneapolis, Milwaukee, Cincinnati and Austin. For more information, visit [aspiriant.com](https://www.aspiriant.com).