



# COMMUNITY INVOLVEMENT *report*



**Jeff Dekko**  
Chief Executive Officer  
*Wealth Enhancement*

*a message from our*  
**CEO**

**At Wealth Enhancement, we look for every opportunity to demonstrate care, and our employees exemplify that commitment each day. Across the firm, teams show up for their communities with compassion, creativity, and a genuine desire to make a difference.**

**In this year's Community Involvement Report, you'll read stories of employees who brought our values to life.**

**From our Corporate Administration and Legal Team joining Loaves and Fishes in the fight against hunger, to our Oswald Team helping restore wetlands with the Clean Lakes Alliance in Wisconsin, to our FinGroup Team partnering with The Faris Foundation to bring hope to children with cancer, each example reflects the heart of who we are.**

These stories highlight just a fraction of the meaningful work happening across Wealth Enhancement Group (WEG) all year long. Every day, employees volunteer their time, lend their skills, and quietly offer support—often without recognition. This report provides a small window into that spirit of service and the collective impact we create when we act together.

What stands out most is not just what we accomplished, but how we did it. Teamwork, compassion, and integrity shaped every effort. Our employees collaborated across offices, strengthened connections, and worked side by side with community partners to drive lasting change.

To every employee who devoted time, resources, and heart this year—thank you. Your commitment shows that when we lead with integrity and demonstrate care, we can make a meaningful difference in the communities we serve.

Best,

Jeff Dekko  
Chief Executive Officer  
Wealth Enhancement

# White Pony Express and Walnut Creek: A Partnership That Delivers

## Concord, California

**In Concord, California, White Pony Express (WPE) is a community lifeline. The nonprofit rescues surplus food and goods from local stores, bakeries, and restaurants and redistributes these items to shelters, foster programs, and families in need. Their mission to cut waste and fight food insecurity makes them a vital link between those who can give and those who need support.**

At WPE, the WEG's Walnut Creek, InConcert Napa Valley, and Prozan team members are familiar faces. "Amid federal cutbacks, the extraordinary volunteerism of Wealth Enhancement shines as a beacon of hope," said WPE CEO Eve Birge. "They uplift our community and remind us that generosity can overcome the greatest challenges."

The three teams share an office in Walnut Creek. While each has its own history, opportunities like volunteering at WPE allow them to collaborate.

"Napa Valley is very community-centric," said Senior Client Services Associate Kendal Buffington. "The Day of Service and commitment to community was one of the reasons I applied for this job. I love the importance Wealth Enhancement puts on taking care of the communities they live and work in."

During a recent visit to WPE, volunteers split into two groups: one assembled treat bags for single mothers, carefully sorting and packaging donated sweets, while the other unloaded produce to be weighed, sorted, and prepared for distribution. With donations

arriving daily from local grocers and food outlets, the items on hand are constantly changing.

"They provide for women's and homeless shelters, foster kids, and even have compost, going beyond the typical food pantry obligations," said Senior Client Services Associate Wendy Sayan.

“ I love the importance  
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puts on taking care of  
the communities they  
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"They are the funnel: every local organization comes together through them to give back."

Through their work at White Pony Express, the WEG teams are strengthening their community and their connection as a team.





## WEG's FinGroup Team Fuels Hope with Faris Foundation Partnership

### Houston, Texas

**At the heart of The Faris Foundation's mission is a commitment to bring "brighter days and better treatments" to children with cancer. That mission resonated deeply with the FinGroup Team of Houston, Texas, whose members share a personal connection to the cause.**

"Twenty five percent of our team has been impacted by cancer in some way," said Rick Alphonso, Senior Vice President, Financial Advisor. "It's the creed we have lived by for 28 years to help people achieve independence, and that includes standing with them through life's challenges."

"It's a topic that hits close to home and it's a wonderful cause," added Thomas Sartor, Senior Vice President, Financial Advisor.

The FinGroup Team joined The Faris Foundation for a "Good Juju Party," one of the organization's hallmark events that spreads joy to children fighting cancer. The group decorated care boxes, each tailored to a specific child, and wrote personal messages of encouragement.

"Fun colors, exciting stickers, and joyful energy all designed after Faris's cheer," said Director of Advisor Services Lynnette Okwuonu. "Inside the boxes we decorated were gifts donated by the community for children fighting cancer."

The team continued their support with donations both immediately after their service and during WEG's Charitable Matching Challenge, with Rick and his wife, Connie, matching every team gift.

"The FinGroup Team is a shining example of what it means to serve with purpose and compassion," said Asha Virani, founder of The Faris Foundation. "I am in awe of their kindness."

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When Tax Advisor Laura Hellinghausen suggested volunteering with The Faris Foundation for the team's Day of Service, the decision was unanimous.



## More Than a Meal: WEG's Corporate Administration and Legal Team Gives Back

### *Minneapolis, Minnesota*

**Each year during WEG's Day of Service, employees across the firm dedicate a day to serving others. For the Corporate Administration and Legal Team, that day has become an opportunity to put on their proverbial sous chef hats and make a difference in their community.**

For the past three years, the team has partnered with Loaves and Fishes, a Minneapolis-based nonprofit. The organization serves anyone who is food insecure or vulnerable while rescuing wholesome food destined for landfills from grocers and restaurants.

This year, the WEG team joined forces once again with Loaves and Fishes to help prepare meals for those in need. Together, they sorted, cleaned, and cut more than 500 pounds of potatoes.

"It's incredibly eye-opening to see how many in our communities need support," said Marcy Goldman, Administrative Program Manager on WEG's Corporate Administration and Legal Team.

"But even something as simple as cutting potatoes for a half day can make a meaningful impact."

"It can be daunting staring down 500 pounds of potatoes," she continued. "You think, 'Oh my gosh, we'll be lucky if we get through 300 pounds.' But the staff's passion became our motivation."

According to Kiley Benson, Executive Director of Loaves and Fishes, the WEG team made a lasting impression. "They brought amazing energy and showed incredible commitment to help us prepare and provide healthy meals where the need is greatest," Kiley said.

Through WEG's Charitable Matching Challenge, the Corporate Administration and Legal Team also contributed to the cause financially, helping raise more than \$50,000 in 2025 to support Loaves and Fishes.

**“** *When we volunteer with an organization like Loaves and Fishes, we're not just supporting our communities – we're empowering ourselves.* **”**

After a day of volunteering, the team left with more than a sense of accomplishment; they gained a deeper understanding of their community and of one another.

"When we volunteer with an organization like Loaves and Fishes, we're not just supporting our communities – we're empowering ourselves," said Marcy.



*more than a meal: giving back*



## HR in Action: Supporting Good in the 'Hood

### Minneapolis, Minnesota

**For the WEG Human Resources Team, giving back isn't just a one-day effort; it's an annual tradition that deepens each year. For three years, the team has volunteered with Good in the 'Hood in Minneapolis, Minnesota, advancing its mission to serve families in need.**

"Wealth Enhancement supports families, and so does Good in the 'Hood," said Nicole Rusling, Senior Talent Acquisition Specialist on WEG's Human Resources Team. "Our respective missions and values align so completely. We're both here to improve people's lives, so it's just a perfect fit."

This year, the HR Team contributed to both efforts. Some sorted shoes for Shoe Away Hunger; others packed groceries for families served by Food in the 'Hood. Sorting shoes might sound simple, but it requires volunteers to "score" each pair based on condition— "great," "good," or "grind," with the last category recycled.

“ Our respective missions and values align so completely. We're both here to improve people's lives, so it's just a perfect fit. ”

"In the beginning, we were sorting and scoring," said Nicole. "We joked about each other's taste in shoes. But we quickly learned each other's strengths, and the teamwork just developed naturally."

According to Reverend Shawn Morrison, Founder and Executive Director of Good in the 'Hood, the WEG team's enthusiasm stood out. "Their energy, attention to detail, and genuine care made a meaningful difference as they sorted shoes and packed groceries for our neighbors in need," he said.

By the end of the day, the HR Team had sorted more than 800 pairs of shoes and packed enough groceries to feed over 800 people for a full week. Before heading home, they shopped for shoes, knowing each purchase supported the food programs they helped sustain.

"The Good in the 'Hood team is always welcoming, and our team feels energized by the work," said Nicole. "It's rewarding to see how a few hours of service can strengthen both our community and our HR Team."

That alignment comes to life through two core Good in the 'Hood initiatives: Shoe Away Hunger and Food in the 'Hood. The first offers affordable shoes to those in need and helps fund Food in the 'Hood, which feeds more than 7,500 people each month.



therescuemission.org

## Lighthouse Team Lends a Hand at the Frederick Rescue Mission

### Frederick, Maryland

**The Frederick Rescue Mission, an organization serving the needs of its namesake community in Maryland, relies on volunteers to keep its programs running. Just ask their Volunteer Manager Carolyn Chandler.**

“The Mission depends on the generosity of our community,” Carolyn said. “Many of the people we serve are facing challenging circumstances, often in more than one area of their lives.”

From nearby New Market, Maryland, WEG’s Lighthouse Team was eager to visit the Mission and deepen their local connections. According to Justin Byram, Vice President, Financial Advisor and Jess Holler, Team Operations Manager, their success is driven by their clients and the community.

“Throughout all the changes—our broker-dealer changes and the merger with Wealth Enhancement—our client base has stood by us,” Justin said. “As we have grown, we have continued to offer the best of both worlds: the resources of a large national RIA with its tools and technology and the strength of our relationships with both clients and the community.”

The annual Day of Service provided a chance to put that commitment into action. In the morning, WEG volunteers stocked the shelves in the Mission grocery store. In the afternoon, they greeted each shopper and helped them find what they needed.

“I had Brussels sprouts and mushrooms, so not a lot of people passed by my area,” Justin quipped.

“It was great to be there and welcome everyone with a smile,” Jess said. “The Mission has grown from just assisting men experiencing homelessness to serving the needs of men, women, and children

through food distribution, safe housing, an education center, addiction recovery, and clothing needs.” During their time at the Mission, the crew assisted nearly 200 people.

The team also finds opportunities to give back year-round. During a recent client appreciation event, guests entered a raffle for a chance to direct a \$500 donation to the charity of their choice.

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“Having these team-building events has a positive impact,” Justin explained. “And we see the compounding effects, both for the organization and our team, days and weeks after.”



making a difference



## WEG's Oswald Team Works to Restore Wisconsin Wetlands

### Madison, Wisconsin

The Clean Lakes Alliance (CLA), a nonprofit dedicated to the protection of lakes, streams, and wetlands local to the Madison, Wisconsin area, represents exactly what the Oswald Team stands for. The organization has put community health first since its founding in 2010.

"We all live in the greater Madison area," said Financial Advisor Lisa Fishler. "Giving back helps us connect with our clients and the place we call home."

The volunteer day was made even better by having clients join as well. We enjoyed the camaraderie during the event."

Outside of the Day of Service, the team finds plenty of other opportunities to give back. Members of the Oswald crew have donated both time and money to numerous institutions, including Friends of UW Health, Journey Mental Health, Wisconsin Veterinary Medical Foundation, and the University of Wisconsin Carbone Cancer Center.

But Lisa, on behalf of the team, reported that the crew wants to return to CLA next year. And it seems the feeling is mutual.

CLA's Watershed Programs Manager Caitlin McAleavey said, "We appreciate the Oswald Team joining us! Their efforts to remove invasive species near our lakes make room for a greater diversity of native plants, stabilize our shorelines, and prevent flooding in our nearshore environments."

"Volunteering with CLA was fun and meaningful," said Lisa. "We're proud of what we accomplished together and look forward to our next service day."

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The Oswald Team worked with the CLA for their Day of Service; it was their first time assisting the organization.

"We worked hard removing invasive species like buckthorn," Lisa recalled. "The temps were warm and there was a chance of thunderstorms, but we had a lot of fun."





## Making a Difference with Our Dollars

**At WEG, giving back is an integral part of who we are. Each year, WEG teams across the country unite around our Charitable Matching Challenge, an initiative that continues to be one of the most inspiring efforts companywide.**

Through this program, employees form teams and nominate a slate of nonprofits. After the list is finalized, fundraising begins. Employees can give to the causes they care about most, and with the support of the Wealth Enhancement Community Fund and our Executive Leadership Team, every donation is matched dollar for dollar.

In 2025, 46 nonprofits across the country benefited from the collective contributions of WEG and our employees. Much of this support went to organizations improving quality of life for those in need and celebrating the everyday heroes who work tirelessly to serve their communities.

From pediatric care, medical research, and disease prevention to youth mentorship, veteran support, and programs that combat hunger and homelessness, a diverse range of organizations received funding through this year's challenge. Together, we raised more than **\$600,000**.

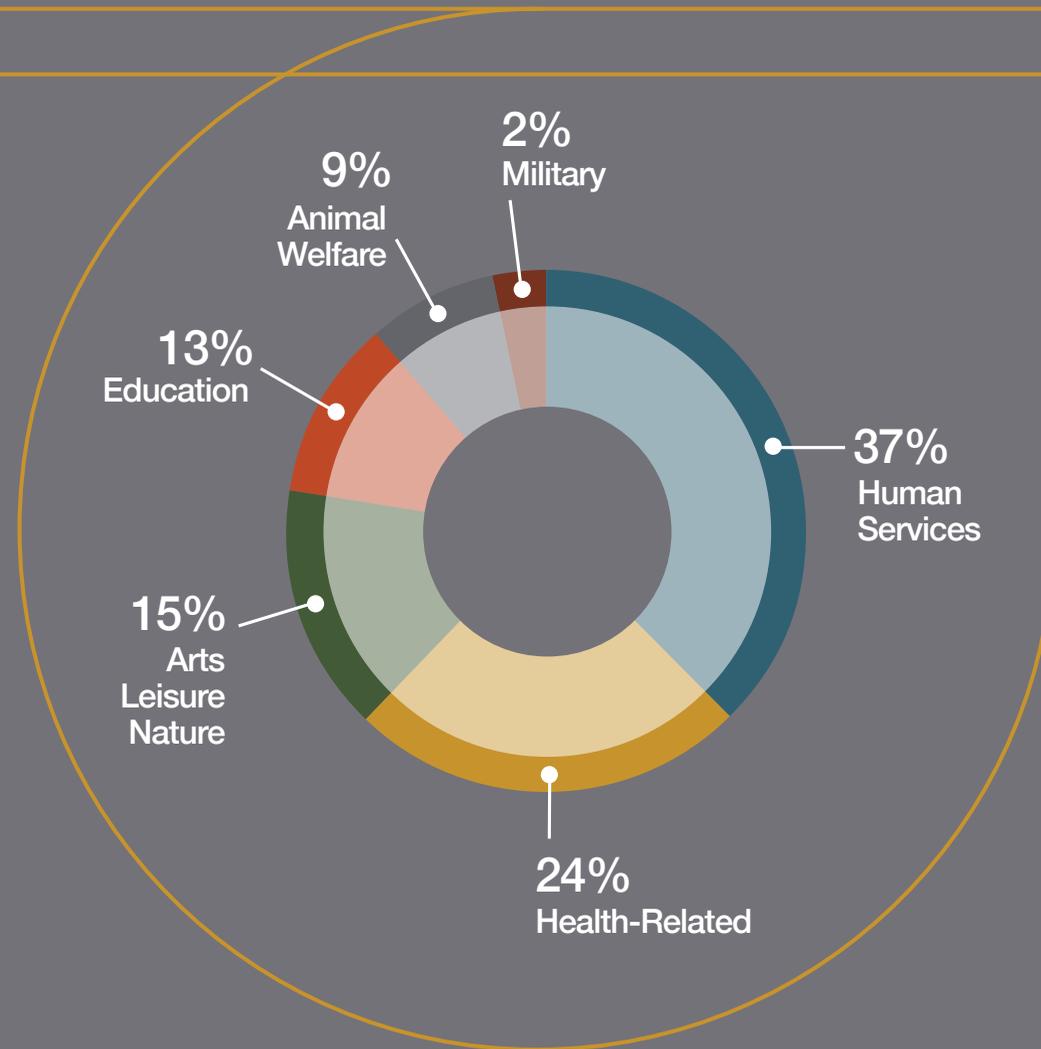
The Wealth Enhancement Community Fund also allows us to respond swiftly when unexpected challenges arise. When wildfires swept through California in early 2025, our firm acted quickly. Together employees and WEG donated a combined **\$110,000** to assist with relief efforts.

Working closely with colleagues who were on the ground, WEG directed funds to nonprofits identified as being best positioned to offer meaningful, immediate support to their communities. It's one example of how our commitment extends beyond planned initiatives. We take action when it's needed most.

By working together and leading with compassion, we continue to build stronger communities, deepen our shared sense of purpose, and demonstrate what it truly means to care.

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## 2025 Non-Profits Donations By Type



*making a difference with our dollars*



*team – together everyone achieves more*



Wealth Enhancement®

