

# NEWS

For Immediate Release

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## **BLX Internship Program Named “Giving Partner” for 2024 Wealthspire Advisor Summit**

*Over \$31,000 raised to bolster diversity within Wealthspire  
and the financial services profession*

**Scottsdale, AZ (February 27, 2024)** – [Wealthspire Advisors LLC](#) (Wealthspire), a New York City-based, independent registered investment advisory firm and subsidiary of NFP Corp., named [The BLX Internship Program](#) (BLX), a 501c(3) organization that provides an entry point to the financial planning profession for Black and Latinx individuals to increase diversity in the industry, its Giving Partner for the 2024 Wealthspire Advisor Summit which was held in Scottsdale, Arizona earlier this year.



The BLX Internship Program being recognized  
as the Giving Partner for the  
2024 Wealthspire Advisor Summit

“Wealthspire was pleased to welcome the BLX Internship Program and two of its co-founders to our Advisor Summit for a cross-regional giving campaign to drive awareness and raise funds for their organization. We are proud to announce that we exceeded our goal of \$15,000 and are matching 100% of the proceeds raised by our colleagues and partners,” said Mike LaMena, CEO of Wealthspire. “We’re also thrilled to be partnering with BLX as we begin recruiting for the 2024 cohort of our internship program. In joining forces, we hope to bolster diversity not only within our organization but also within the broader financial planning profession.”

“We were so thrilled when the Wealthspire team reached out to us about being their Giving Partner for this conference,” said BLX co-founder Shawn Tydlaska. “Luis Rosa and I felt very welcomed throughout the entire weekend. We consider everyone at Wealthspire ‘our people’ in that they focus on fiduciary financial planning first and foremost. The DEIB Committee at Wealthspire has over 20 members, which just shows you how committed they are to improving diversity within our profession. Over the weekend, we raised more than \$31,000! These funds will go straight into the program so that we can help aspiring financial planners land that hard-to-get first job in our industry. It will also help us continue to build our resources for firms to make the hiring process as easy as possible. We look forward to collaborating with Wealthspire in the years to come.”



BLX Co-Founders  
Luis Rosa, CFP®, EA and  
Shawn Tydlaska, CFP®, MBA at  
the 2024 Wealthspire Advisor Summit

## WAYS TO GET INVOLVED

Although the application window is closed for summer 2024 interns, there are still ways for financial planning firms to get involved with the highly impactful DEI work BLX is doing:

1. **Sponsorship:** BLX offers a range of sponsorship opportunities for firms and organizations looking to build the future of the profession that they want to be a part of. Interested parties are invited to [learn more about sponsorships](#).

2. **Giving Pledge:** Earlier this year, BLX launched their 1% giving pledge, asking individuals and firms to pledge 1% of their income to the non-profit organization. This yearly commitment reflects a larger contribution that can have a significant effect on empowering the next generation through educational and internship opportunities. Funds help BLX further initiatives and support the program as a whole. Interested parties are encouraged [to learn more about the 1% Giving Pledge](#).
3. **Giving Partner:** Firms, and conference organizers, can also take inspiration from Wealthspire Advisors and make the BLX Internship Program their giving partner for the year or for their upcoming event. With the support of others in the industry, BLX's goal of making the financial planning profession more reflective of the society it serves will become a reality. Interested parties are encouraged to [inquire about Giving Partner programs](#).

## **ABOUT WEALTHSPIRE ADVISORS**

Wealthspire Advisors is the common brand and trade name used by Wealthspire Advisors LLC, Private Ocean, LLC, and ACG Advisory Services, LLC, separately registered investment advisers and subsidiary companies of NFP Corp. Wealthspire Advisors is an independent registered investment advisor that oversees, across its entities, 22 offices in 12 states throughout the Northeast, Atlantic, Midwest, and West Coast. Wealthspire advisors are fiduciaries who value connecting all parts of a client's financial life to deliver thoughtful, collaborative strategies that optimize their finances and fulfill their aspirations. Wealthspire Advisors acts as a wealth manager, investment advisor, consultant, and constant partner in helping clients gain confidence in their financial futures. For more information on Wealthspire Advisors, please visit [www.wealthspire.com](http://www.wealthspire.com).

## **ABOUT THE BLX INTERNSHIP PROGRAM**

In the wake of George Floyd's death, and in the spirit of the Black Lives Matter movement, the BLX Internship Program was created by four financial planners who had a vision to change the complexion of the financial planning profession. The goal is to place Black and Latinx aspiring financial planners with meaningful paid summer internships and to help make the demographics of the financial planning and investment advisory profession more closely match the demographics of the USA. Learn more about the BLX Internship Program at [BLXInternship.org](http://BLXInternship.org).

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