

Northern Region includes the following states:
IA, ID, IL, IN, MI, MN, MT, ND, OR, SD, WA, WI, WY

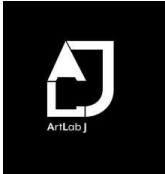
Grant Recipients are listed below in alpha order of 1) their state then 2) city

We salute the following financial professionals, staff members and home office employees for volunteer work in their local community! Those listed below applied for grant to a qualifying charity from the Osaic Foundation during its 2026 funding cycle in March 2026. Applications were evaluated by a committee of advisors, employees and members of the Foundation Board. Grants were awarded on the basis of factors including the level of sustained, hands-on volunteerism by the applicant and the overall purpose, outcomes and mission of the charity.

Nominator	Charity	Website
 Katelyn Kamisar Ops Trainer II, Osaic Solon, Iowa	Iowa Solon Women's Club <i>Katelyn has volunteered for 4 years and devotes 3-4 hours monthly and 36 hours during the club's annual Beef Days fundraising event. The organization conducts service projects to benefit the town of 3200 residents and the surrounding area, such as purchasing new picnic tables and a water fountain for a local park.</i> This civic association received a grant of \$350	
 Teresa Yragui Wealth Management Associates Boise, Idaho	Women's and Children's Alliance <i>Teresa has volunteered for 20 years in several roles: Board member, Finance Committee member and Chair, and currently serves on the Investment Committee. WCA has been a community partner for over 110 years, providing critical services such as support groups, client advocacy, life skills classes, and financial empowerment to those healing from domestic abuse and sexual assault.</i> This health and human services organization received a grant of \$2500	

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 Allison Smith AVP, Marketing, Highland Capital Brokerage Coeur d'Alene, Idaho	Mead Outdoor School <i>For 2 years, Allison has taken 3 days off per year to teach classes, such as Fish Anatomy and Fishing Basics. In addition, she spends a few hours a week preparing material for these classes. Mead serves students K-8 and is a partnership program where parents and certified teachers share responsibility for a well-balanced education.</i> This education-related organization received a grant of \$1000	
 Robert Clifford Stonebrook Mortgage Lewiston, Idaho	Lewiston Rotary Club <i>For 13 years, Robert has volunteered his time assisting with programs and events that provide food, clothing, and medical care to the community. Specific programs include working with the primary and secondary schools' weekend backpack program and supporting students with their G.E.D. scholarships, as well as major fundraising events such as the Lewiston Rotary Bike Rodeo, held in September of this year.</i> This civic association received a grant of \$2000	
 Brian Carlson Alera Group, Inc. Arlington Heights, Illinois	Prospect Girls Feeder Basketball <i>For 7 years, Brian has volunteered 15-20 hours/week, serving as the President/Director. He is involved in all of the day-to-day activities including administration responsibilities, practices and games, ordering of uniforms and equipment, and mentoring volunteer staff and coaches. Their mission is to empower female athletes, 5th-8th grade, through basketball by building skills, confidence, leadership, and lifelong character – on & off the court.</i> This civic association received a grant of \$1000	
 Michael Montag Montag Wealth Management East Dubuque, Illinois	East Dubuque District Library Foundation <i>For 20 years, Michael has served as a Board Member, supporting the foundation in increasing awareness and financial support of the library. The library serves 900+ card holders and is considered a "little treasure" with big impact in the communities it serves.</i> This civic association received a grant of \$1000	
 Kelly O'Malley Northpoint Financial Group Elgin, Illinois	Marklund Children's Home <i>Kelly has been a dedicated volunteer for 6 years, using her passion for reading by reading to the residents and day program attendees every Friday. Marklund's mission is to make everyday life possible for 300 individuals with profound disabilities. This grant funding will help Marklund expand access to day programs with therapeutic and life-enriching experiences.</i> This health and human services organization received a grant of \$2000	

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 Katarina Milojkovic Frydman Asset Management Glenview, Illinois	Westbrook Glen Grove PTA <i>For 2 years, Katarina has served 5-10 hours per week as a Communications Director on the Board. In addition, she leads the yearbook committee and serves as a room representative.</i> This education-related organization received a grant of \$1000	
 Ben Merrill The Next Level Planning Group Orland Park, Illinois	Ballet Five Eight NFP <i>For 5 years, Ben has assisted with performance front-of-house/ushering, set construction, event setup and tear-down, as well as performed with the school and professional company productions of Beyond the Nutcracker. This grant will help make it possible to fund live music, commission new ballets, offer scholarships to young dancers, and bring performances to underserved communities.</i> This arts & culture organization received a grant of \$1000	
 Kenneth Wong Moran Wealth Advisors Park Ridge, Illinois	Vassar College Club of Chicago <i>For 4 years, Kenneth has averaged 15 hours per month serving as Co-President of the local chapter. His duties include managing the annual budget, increasing member engagement, and volunteer recruitment. The grant will be used to fund the club's programming schedule, including a networking event for alumni and students in Finance and related fields.</i> This civic association received a grant of \$500	
 Blake Carlin SSB Investment Services Quincy, Illinois	United Way of Adams County, Inc. <i>For 6 years, Blake has served on the Resource Reinvestment Committee requiring a 5-week commitment to interview partner agencies requesting funds from the United Way. Most recently, he has been serving on the Finance and Investment Committee meeting on a monthly basis to review the organization's financials.</i> This health and human services organization received a grant of \$1000	

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 Amanda Janssen Artisan Wealth Management, LLC Clarksville, Indiana	Beautiful As You Are aka BAYA Corp <i>For 3 years, Amanda has dedicated 3-4 hours per month teaching financial literacy to the girls. B.A.Y.A is driven by a mother's unwavering love and a fierce response to the bullying her daughter endured. With Jasmine's permission and support her story is used to help families experiencing similar issues. B.A.Y.A encourages individuals to celebrate their individuality and embrace their strengths, quirks, and imperfections.</i> This health and human services organization received a grant of \$1000	
 Angela Perez Consultant, Financial Planning Experience, Osac Fort Wayne, Indiana	PFLAG Fort Wayne <i>For 2 years, Angela has served as a Board member and co-secretary managing digital records, oversight of treasury, and communication to members. In addition, she volunteers at events and community educational courses. PFLAG's mission is to create a caring, just, and affirming world for LGBTG+ people and those who love them.</i> This health and human services organization received a grant of \$350	
 Courtney Hill Wealth Strategies Yorktown, Indiana	CJD Foundation – Creutzfeldt-Jakob Disease Foundation, Inc. <i>In the past year, Courtney and her firm have been involved with Strides4CJD. This year will be the inaugural walk for the Foundation in her area and is in honor and memory of one of the firm's colleagues who passed away last year. Courtney's firm is an advisor to the regional walk committee.</i> This health and human services organization received a grant of \$350	
 Iuliana Keyes Vim Capital Detroit, Michigan	ArtLab J <i>Iuliana has volunteered over the last 5 years, working to engage the community and share information about their programs. This grant will be used to expand access to arts education by supporting program scholarships, instructional materials, studio improvements, guest artist collaborations, and community outreach initiatives. Funds will help reduce financial barriers and increase participation for low- to moderate-income families.</i> This arts & culture organization received a grant of \$1000	

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 Iuliana Keyes Vim Capital Ferndale, Michigan	Ferncare Free Clinic, Inc. <i>Iuliana has served as a Board Member for the past 3 years. Her responsibilities include project management, organizing events, and brainstorming to increase the visibility of the clinic. This clinic enhances lives and champions thriving communities by providing no cost health services and advocacy for medically uninsured people.</i> This health and human services organization received a grant of \$5000	 FERNCARE FREE CLINIC
 Keith Platte HFG Financial Group Kalamazoo, Michigan	Edison Initiatives L3C <i>Keith has volunteered for the past 5 years and most recently is the new volunteer Director for this non-profit. He leads a core team of 12 volunteers and 100+ community volunteers, purchasing and remodeling homes for low-income individuals. Specifically, this grant will help in purchasing materials for a new kitchen in a 100+ year old home.</i> This health and human services organization received a grant of \$500	 EDISON INITIATIVES
 Kelly Schaap HFG Financial Group Kalamazoo, Michigan	Tree of Life Elementary School Path of Life High School <i>Kelly's firm has adopted Tree of Life as a charitable partner organization. Kelly has volunteered over the past 4 years organizing an annual fundraiser which provides funding through client engagement each Thanksgiving. Additionally, her office provides pro bono financial services to the schools, as well as provides assistance with research, planning and preparation for a board directed endowment fund.</i> This education-related organization received a grant of \$1000	 Tree of Life SCHOOL Path of Life HIGH SCHOOL
 Sacha Thebolt Seegert & Seegert Financial Advisors Petersburg, Michigan	Nancy DeGraff Toll Chapter of the DAR of Michigan <i>Sacha has volunteered around 26 hours per month over the past year as the Vice Regent for the Nancy De Graff Toll Chapter of the DAR of Michigan. She assists with monthly meetings, the lineage committee, and the American 250 committee. Additionally, she organizes events to fundraise for their Good Citizens Scholarship program.</i> This civic association received a grant of \$1000	 DAR Daughters of the American Revolution

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 John Bussa Bussa Financial Partners Southgate, Michigan	The Guidance Center <i>For 23 years, John has volunteered @ 5 hours per month, and currently serves on the Board of Directors. He regularly organizes and packs bags of donated items for families in need. This grant will provide funding for Kids-TALK Children's Advocacy Center and will allow the agency to provide counseling services to more children in need and reduce the time to be seen.</i> This health and human services organization received a grant of \$5000	
 Jeffrey Bearance Rochester Wealth Management Washington, Michigan	Elizabeth's Closet <i>Jeffrey is the co-founder and has volunteered for the past seven years, primarily obtaining items for silent auctions, fundraising, advertising, and performing all necessary duties, alongside his wife – the Founder. This non-profit raises funds to provide annual support to the Corewell Health Infant Bereavement Program. They also support those in need of ongoing grief counseling by establishing local support groups.</i> This health and human services organization received a grant of \$500	
 Jennifer Jensen Bokeh Financial Ypsilanti, Michigan	FedUp Ministries <i>Jennifer has been volunteering for the past two years, working about 3-4 hours per month with their food truck, community dinners, and the BuddyUp program. This grant will help with all programs and initiatives scheduled for 2026.</i> This health and human services organization received a grant of \$350	
 Timothy Johnson Eagle Financial Services Alexandria, Minnesota	Lakes and Prairie United Way <i>Timothy has volunteered an average of 15-18 hours per quarter over the last 7 years working with both the Food Drop and Back Pack Attack programs. He coordinates receiving the pallets of food, repacking as appropriate and getting this food to families (Food Drop) or to schools for distribution (Back Pack Attack).</i> This health and human services organization received a grant of \$1000	

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 Mike Sullivan Director, Digital Enablement Telephony Bemidji, Minnesota	Saint Ann's Monthly Community Meal Program <i>Mike has volunteered for 6 years serving as chair of the parish finance council as well as hands-on service with its free monthly open to the public community meal program.</i> This health and human services organization received a grant of \$1000	
 Joseph Mulheran Signature Private, The Joseph Mulheran Group Golden Valley, Minnesota	Child Loss Foundation (formerly The Believe Foundation) <i>Joseph has volunteered for the past 3 years, aiding its programs where needed by assisting with fundraising efforts and awareness. The charity assists grieving families with overcoming financial hardship related to the loss of a child.</i> This health and human services organization received a grant of \$1000	
 James Christian Osaic Wealth, Inc. Lakeville, Minnesota	Rotary Club of Lakeville Foundation <i>James has been a longtime and active member, serving 20+ years as Club President and Board member. He has chaired the Taste of Lakeville event the last 8 years, which is their signature fundraising event.</i> This civic association received a grant of \$3000	
 Jacqueline Miller New Business Team Lead, Highland Capital Brokerage Maple Grove, Minnesota	Immanuel Baptist Tabernacle - Sisters Transforming Program <i>Jacqueline has volunteered for 13 years, serving about 20 hours per month as its Treasurer. The organization sponsors a program that provides a separate space and opportunity for women coming out of drug rehab and incarceration to grow in life skills. This grant will allow them to continue to travel for prison outreach, as well as provide business attire for women re-entering the workforce post-treatment.</i> This health and human services organization received a grant of \$2500	

Nominator	Charity	Website
 Brock Eckman GT Financial Advisors, LLC Maplewood, Minnesota	Knights Wrestling Association <i>For over 7 years and 275-300 hours per season, Brock has served as a wrestling coach and mentor by assisting with running practices, coaching at meets and tournaments, and mentoring student athletes about personal finance.</i> This civic association received a grant of \$1000	
 Tanya Mayhew J.D. Kreps Financial Group, Inc. New London, Minnesota	Link of Northern Kandiyohi County <i>For 6 years, Tanya has volunteered 10 hours per month as Board Chair. She oversees board and committee meetings, appoints committee chairs, ensures resolutions are carried out, helps recruit new board members, assists in new member orientation, and acts as an alternate spokesperson.</i> This health and human services organization received a grant of \$1000	
 Erik Eveland VP, Finance Business Partner, Osaic Oakdale, Minnesota	St. Michael Elementary Parent Teacher Organization <i>For 7 years, Erik has volunteered at various fundraising events: Book Bingo, Spirit Fest, Family Fun Night, Fun Run. Tasks vary depending on event but can include event setup/clean up, running a station at the event, event prep work, etc. There are 6 events held each year.</i> This education-related organization received a grant of \$500	
 Lee Underdahl Finance Manager, Osaic Oakdale, Minnesota	Twin Cities Habitat for Humanity <i>For 6 years, Lee has served as the EAC lead for the Oakdale office, coordinating and managing the Habitat for Humanity event in the east metro. The project will take place in October to assist in a full build, which typically takes about 6-8 months.</i> This health and human services organization received a grant of \$2500	
 Jayme Hall Supervisor Field Supervision Administration, Osaic Oakdale, Minnesota	Feed My Starving Children (FMSC) <i>Jayme has volunteered for 15 years and serves on its MN Council which acts as ambassadors for FMSC in the community by helping to increase financial support and public awareness of the mission. She has also led site EAC group team efforts in Oakdale to build meal packs.</i> This health and human services organization received a grant of \$2,000	

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 Jessica Westerberg Everest Support Manager, Osaic Oakdale, Minnesota	Junior Achievement North <i>For 5 years, Jessica has volunteered to help guide students in a simulated real-world community. They run a business, have a job, manage money, make decisions, and work together. As a volunteer her responsibility is to help promote critical thinking, problem solving, and teamwork.</i> This education-related organization received a grant of \$2500	
 Rachel Cornish Financial Dimensions Group, Inc. Roseville, Minnesota	RAHS FireBears Robotics Boosters <i>For 3 years, Rachel has served over 200 hours per year as a parent volunteer. She supports, encourages, and advances the robotics program and related activities financially and physically.</i> This education-related organization received a grant of \$1500	
 Caitlin Edwards Focus Financial Network, Inc. St. Paul, Minnesota	Mile in My Shoes <i>For 2 years, Caitlin has volunteered 1-2 hours per week as a run mentor, attending weekly runs with members of the community. She shares the transformative power of running with the members, building strong meaningful relationships.</i> This health and human services organization received a grant of \$2500	
 Pang Yang Investment Advisory Conversion Consultant, Osaic White Bear Township, Minnesota	Hmong American Partnership – Empowering Hmong Women, Inc. <i>For 8 years, Pang has volunteered 3 hours per month and 8 hours per event as the Treasurer on the Board. Her tasks include: tracking all financial transactions, assisting with fundraising projects, and attending community events, meetings, or conferences to promote organizational goals or solicit donations or sponsorships.</i> This health and human services organization received a grant of \$1000	
 Anthony Noble A.E. Noble & Associates, Inc. Billings, Montana	Yellowstone Bend Citizens Council (YBCC) <i>For 3 years, Anthony has volunteered 2-5 hours per month as the organization's treasurer. He attends board meetings to establish annual budgets and track expenses and helps with fundraising. Recently he has committed to serve on a new sub-committee focused on community organizing to further YBCC's mission of maintaining healthy ecosystems.</i> This civic association received a grant of \$1000	

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 Ashley Noble A.E. Noble & Associates, Inc. Livingston, Montana	Livingston Center for Art & Culture <i>For 7 years, Ashley has volunteered 3-6 hours per week on the Board as its Vice President. Her duties include social media promotions, graphic designing for exhibits and print materials, attending and assisting with artist receptions, and curating community exhibits.</i> This arts & culture organization received a grant of \$500	
 Marrisa Hardy Sunrise Financial Miles City, Montana	Hardy/Kuper Memorial Run <i>For 8 years, Marrisa has volunteered 250 hours per year. She and her husband launched this event in 2018, after the passing of his father. They have worked tirelessly coordinating and managing all of the events. The next event will be held July 11 of this year.</i> This health and human services organization received a grant of \$1000	
 Amanda Quammen-Klein Bravera Wealth, Osaic Institutions Dickinson, North Dakota	Dickinson Catholic Schools Elementary PTO – Trinity School System <i>For 7 years, Amanda has volunteered her time supporting the students and teachers of the elementary school. She is currently serving her second year as the president of the organization, previously serving three years as the treasurer.</i> This education-related organization received a grant of \$2000	
 David Mann Osaic Wealth, Inc. Fargo, North Dakota	Fargo Area Sports <i>For 4 years, David has volunteered 10 hours per week as a Board member, coach, among other volunteer activities. This grant will be used to bring turf fields to Fargo, which will enhance the experience for all the youth in these programs.</i> This civic association received a grant of \$350	
 Melanie Madden Futurity First Talent, Oregon	Disruptors Org <i>For 10 years, Melanie has volunteered her time assisting in the creation of the organization and serving on the Board. She currently serves as the Secretary. She supports survivors' needs and assists with the educational training for professionals (medical and law Enforcement) whose work connects with survivors of sex trafficking.</i> This health and human services organization received a grant of \$2000	

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 Roxanne Waterman Waterman Wealth Strategies West Linn, Oregon	ServeNow <i>For 11 years, Roxanne has volunteered as an annual business sponsor and public relations advocate. Her focus is on educating communities about the impact of compassionate service and the long-term transformation it brings to individuals facing deep hardship.</i> This health and human services organization received a grant of \$2500	
 Layne Bruner Harbor Investment Advisors Aberdeen, Washington	Bobcat Booster Club <i>Layne has volunteered 20 hours per week for the past 4 years supporting Aberdeen High School Baseball. He assists with field preparation and ongoing maintenance to ensure safe and playable conditions for student-athletes throughout the season. This grant will be used to purchase essential field maintenance materials.</i> This civic association received a grant of \$500	
 Layne Bruner Harbor Investment Advisors Aberdeen, Washington	Multi-Sport 360, Inc. <i>As the founder, President and primary volunteer, Layne is actively involved in the day-to-day operations and long-term development of their indoor training facility that supports multiple local youth and school-based baseball and softball programs.</i> This civic association received a grant of \$2000	
 Gina O'Neil Harbor Investment Advisors Aberdeen, Washington	PAWS of Grays Harbor Progressive Animal Welfare Society <i>For 4 years, Gina has volunteered her time serving in several roles, including dog walking, dog care, helping visitors, stocking the community food pantry and helping with photo shoots for holiday social media posts.</i> This civic association received a grant of \$500	
 Shelly Mathis SLM Financial Services Camano Island, Washington	Hope Unlimited <i>For 11 years, Shelly has volunteered her time as a former board member and currently works on a project basis as a volunteer, fundraising where needed, and as a consultant to the organization regarding tax and HR issues. The group serves those involved with Fire, Police, Community Chaplaincy & Incident Support</i> This health and human services organization received a grant of \$2000	

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 Kyle Temple Mirus Planning Spokane Valley, Washington	Poynter Foundation <i>For 5 years, Kyle has served on the Board of Directors as the Treasurer. He volunteers 5-6 hours per month involved in all operational and fundraising projects of the organization.</i> This education-related organization received a grant of \$1500	
 Dominic Reinerio TMS Financial De Pere, Wisconsin	De Pere Area Chamber of Commerce Foundation <i>For 2 years, Katie, Dominic, and Jake have volunteered with the Chamber, along with their firm, TMS Financial, a Champion Partner of the Chamber. As a member of the Board of Directors, Katie actively participates in board meetings, contributes to policy development, and provides feedback to ensure the Chamber's sustainability and accountability. Additionally, as a Director, Katie serves as an ambassador for the Chamber by cultivating relationships with members, community stakeholders, and civic leaders to foster partnerships that drive regional prosperity.</i> <i>Dominic, Jake, and Katie all serve on the Events Committee, with Katie serving as Chair. The Chamber offers a wide variety of events throughout the year and Dominic, Jake, and Katie are part of a dedicated team of leaders who ensure these events happen. The community festivals open the door for local businesses to gain visibility, attract new customers, and celebrate what makes the city unique. The networking mixers break down the barriers of competition and replace them with collaboration, giving entrepreneurs and professionals the relationships they need to succeed. Grant funding will support student scholarships, expansion of career exploration events, and development of new programming opportunities. Funds will also help launch a mentorship program that connects students directly with local business leaders, as well as a future business idea competition that provides seed funding to student entrepreneurs.</i> This civic association received a grant of \$1700	
 Jake Vande Voort TMS Financial De Pere, Wisconsin		
 Katie Weinschenk TMS Financial De Pere, Wisconsin		
 Daniel Weber Belke Financial Group Fond du Lac, Wisconsin	Fond du Lac School District Fondy Fire FRC Robotics Team 2194 <i>For 14 years, Daniel has volunteered 20-40 hours per week from January – April, serving as an engineering mentor for the Fondy Fire FRC team 2194. This includes the build and competition seasons. The grant will be used to support the cost of building a robot and/or to cover the entrance fee for competitions.</i> This education-related organization received a grant of \$1000	

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 Brad Leissring Leissring Financial Madison, Wisconsin	Civil Air Patrol Milwaukee Composite Squadron <i>For 2 years, Brad has volunteered 2 hours per week as a Sponsor Member, chaperoning youth in the program, as well as providing transportation, logistical support, and fundraising support.</i> This civic association received a grant of \$500	
 Carrie Schmidt Equanimity Wealth Planning and Investing Madison, Wisconsin	Business Forum Foundation <i>For 9 years, Carrie has volunteered 5 hours per month as a former Board member and currently as a Board Member at large. This grant will go towards the Scholarship fund/program which awards 5-6 grants annually.</i> This civic association received a grant of \$1000	
 Carrie Schmidt Equanimity Wealth Planning and Investing Madison, Wisconsin	YogAutism, Inc. <i>For 8 years, Carrie has volunteered 5 hours per month as a former Board member and currently as a Board Member at large. This grant will be used to build reserves as overhead costs have grown.</i> This health and human services organization received a grant of \$1000	
 Gillian Ward Portfolio Manager, Osaic Madison, Wisconsin	Underdog Pet Rescue of Wisconsin, Inc. <i>For 6 years, Gillian has volunteered 5-10 hours per week as Concessions Events Coordinator and Adoption Follow-Up Support Volunteer, and 8-16 hours per month as an Events Volunteer. Grant funds will be used to supplement what lower income clients can afford.</i> This civic association received a grant of \$1500	
 Wade Paffenroth Hesperus Wealth Planning Neenah, Wisconsin	Remarkable, Inc. <i>For 8 years, Wade has served as the President of the Board, volunteering 10 hours per month on the Board, subcommittees and events/engagements. This grant will help fund a sensory space in the Day Service area, providing a space to decompress and de-escalate when life gets stressful for those they support.</i> This health and human services organization received a grant of \$1500	

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 Matt Loverine High Point Capital Group Waukesha, Wisconsin	ProHealth Care Foundation <i>For 10 years, Matt has volunteered 4 hours per month facilitating his firm's sponsorship of events, including the Garden of Gratitude and Walks for Cancer. He also continues to give Financial Wellness Presentations for ProHealth Care employees.</i> This health and human services organization received a grant of \$1000	
 Bella Krug-Wagner High Point Capital Group West Milwaukee, Wisconsin	Hunger Task Force <i>For 2 years, Bella has volunteered for several events supporting the Hunger Task Force. In 2025, she was part of a 40 person team who worked at the Hunger Task Force farm, weeding green bean plants. This year, they will be packing a Stockbox for local seniors in need. A Stockbox is a box of healthy foods that Hunger Task Force delivers to low- income seniors free of charge.</i> This health and human services organization received a grant of \$2000	