

## 2023 Local Community Grant Recipients Southeast Region

Southeast Region includes the following states: AL, AR, DE, FL, GA, KS, KY, LA, MD, MO, MS, NC, SC, TN, VA, WV

## Grant Recipients are listed below in alpha order of their state

We salute the following financial professionals for volunteer work in their local community! Those listed below applied for grant to a qualifying charity from the Osaic Foundation during its 2023 funding cycle in Q42023. 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
Brett McMillan McMillan Financial Services/Securities America Arkansas	New Life Church of Arkansas  Brett has volunteered with the non-profit for 10 years by participating in "Thankserving" where they give meals to those in low-income areas, Christmas Mall where they help parents shop for gifts for their children, and serves food at Hope Campus which is a local homeless shelter. The church partners with CityServe and other local churches to help restore broken lives in the community. They build a community among groups of people in similar circumstances and empower them to raise their families and live life each day.  This health and human services non-profit received a grant of \$500.	NEW LIFE CHURCH
Joseph J Maltese Joseph J. Maltese Financial Services, LLC/Osaic Wealth Florida	American Legion Mandarin Fallen Heroes Post 372  Joseph has dedicated 80 hours a month over the past eight years volunteering with the non-profit by caring for disabled veterans, supporting children and youth programs, law and order/first responder awards, and supporting the food bank. The non-profit enhances the well-being of America's Veterans, their families, the military, and the community by providing Veteran Suicide Prevention and promoting education and sportsmanship in the youth.  This civic association non-profit received a grant of \$2,000.	AMERICAN FAMILY  LEGION &

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Edward Kemm Ironbridge Wealth Counsel/Osaic Institutions Florida	ARC of the Treasure Coast, Inc.  Edward has spent the past nine years volunteering for the non-profit, serving as a past chairman of the board, and currently serving as a board member. This non-profit empowers children and adults with Intellectual/ Developmental Disabilities and other related disabilities to achieve their fullest potential through state-of-the-art residential, vocational, educational, behavioral, and other health related programs and services.  This health and human services non-profit received a grant of \$1,000.	Advocates for the Rights of the Challenged
Ryan Van Buren One Overvue/Osaic Wealth Florida	Brevard Soccer Alliance, Inc /Brevard Soccer Academy (BSA)  Ryan has volunteered with the non-profit for five years and serves as a board member and president. The non-profit empowers and develops young players to achieve their ultimate potential, on and off the field, through premium coaching, the highest quality training and competition, and by becoming the destination club in East Central Florida. They inspire and educate the youth with "player first" and "one club, one vision" themed programs. They offer community based, recreation soccer to the youth of Brevard County.  This civil association non-profit received a grant of \$625.	SOCIER ACHOLIE
Diego Morcillo Osaic Wealth Florida	City House Inc  Diego has volunteered with the non-profit for two years, supporting the goal to provide hope and renewal to single mothers and their children experiencing homelessness in Pal Beach County, Florida.  This health and human services non-profit received a grant of \$500.	cıtyh@use
Victoria Brialmont American Portfolios Financial Services Florida	Friends of Jupiter Beach  Victoria has volunteered at the non-profit for 12 years, and has served as a board member since 2017, where she participates in monthly beach cleanups and assists in execution of annual charity food and wine festivals. This environmentally conscious non-profit benefits the community of Jupiter Beach by maintaining healthy and dog-friendly beaches through education, volunteerism, and community support.  This civil association non-profit received a grant of \$2,000.	FJB  ARIENDS OF JUPITER BEACH

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Emilio Vazquez  Grove Bank and Trust/Osaic Institutions Florida	Gablestage, Inc.  Emilio has volunteered at the non-profit for two years by actively donating, fundraising, and being the financial representative. The non-profit provides South Florida audiences with theatrical works of artistic excellence that confront today's issues and ideas, with the most recent tour being Shakespeare reimagined in a contemporary context.  This cultural non-profit received a grant of \$500.	GABLESTAGE
Paul Bonaros Paradigm Wealth /Osaic Wealth Florida	Place of Hope at the Leighan and David Rinker Campus  Paul and his wife have been key supporters of the non-profit for 10 years, having served as committee and board members. The non-profit is dedicated to providing a stable and loving family environment for children, youth, and families who are hurting. They offer a full continuum of care for those in need with programs and services specializing in family outreach, maternity care, human trafficking education, recovery for victims of domestic minor sex and labor trafficking, affordable transitional housing and support services for young adults, housing and support for homeless families, foster care recruitment, hope and healing opportunities for children, youth, and families throughout the region.  This health and human services non-profit received a grant of \$2,500.	The Leighan and David Rinker Campus
Emilio Vazquez Grove Bank and Trust/Osaic Institutions Florida	Project YES (YES Institute)  Emilio has volunteered with the non-profit for 24 years and sits on the board of directors and serves as the treasurer. The non-profit helps to prevent suicide and ensure the healthy development of youth through powerful communication and education on gender and orientation. Creating a safer and more inclusive community and preventing bullying for the LGTBQ+community is done through their Inclusive Futures program, which provides education on gender, orientation, race, and communication.  This health and human services non-profit received a grant of \$2,000.	THE SOURCE FOR KNOWLEDGE ON GENDER & ORIENTATIONS
Nicola Nichol Financial Strategies of Amelia/Securities America Florida	SEZARC (South-East Zoo Alliance for Reproduction & Conservation)  Nicola has volunteered with the non-profit for 13 years and serves as a board member, participates in forward planning visioning, and giving business advice. The non-profit focuses on scientific solutions for reproductive challenges to support self-sustaining populations of endangered species under managed care and in the wild. They support zoos & aquariums by helping the species who are disappearing rapidly from our planet.  This civic association non-profit received a grant of \$500.	SEZARC

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NO PHOTO AVAILABLE  Kenneth Guard Securities America Florida	Young Marines of North Central Florida  Kenneth has volunteered with the non-profit for three years, working with disadvantaged youth and teaching them life skills, word working, lawnmower maintenance, and training from the national manual. The non-profit serves children ages 8 through the completion of high school and promotes the mental, moral, and physical development of its members, focuses on character building, leadership, and promoting a healthy, drug-free lifestyle.  This civic association non-profit received a grant of \$1,000.	Young Marines
Claudia Sachs Bay View Capital Advisory Group/Securities America Florida	Zonta Cares of Tallahassee  Claudia has been an active member of the non-profit for 17 years and has served in many roles, including membership director, financial literacy assistant, chairman of fundraising, grant writer, vice president, president, and director at large. The non-profit provides support for local and international services and education programs, including direct volunteer service and funding to partner organizations who provide support to women and girls experiencing homelessness, sexual abuse and violence, educational challenged, and human trafficking.  This civic association non-profit received a grant of \$7,500.	ZONTA  CLUB OF TALLAHASSEE
Travis Ruane Associated Financial Consultants & Investor Services/Securities America Florida	Coast to Coast Legal Aid of South Florida  Travis has served as a board member for two years at the non-profit. They provide quality, comprehensive, free legal advocacy, helping thousands of economically disadvantaged residents gain equal access to legal justice. The non-profit aims to increase the safety and stability of vulnerable, underserved, and under resourced members of the community through free legal services.  This health and human services non-profit received a grant of \$1,000.	COAST TO COAST LEGAL AID SOUTH FLORIDA
Robert Wilson Triad Advisors Georgia	Lily Pad Sane Center Inc.  Robert has volunteered with the non-profit for 10 years and serves as a general board member, giving assistance and guidance as well as fundraising. The non-profit provides 24 hour services in Albany/Dougherty County and Southwest Georgia for all victims of sexual assault. They serve the needs of clients including crisis intervention and safe, compassionate forensic medical evaluation and evidence collection. They collaborate with local, state, and national resources to provide a safe haven for victims of sexual assault and their families in the immediate aftermath of an assault. They also provide education in all aspects of the local community regarding sexual assault.  This health and human services non-profit received a grant of \$1,000.	¿ lily pad

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Herman (Tommy) Thompson Innovative Financial Group/Osaic Wealth Georgia	Reclif Community Inc.  Herman earned his Chartered Special Needs Consultant Designation last year and joined the Academy of Special Needs Planners. He has volunteered at the non-profit for a year and educates the special needs families on financial planning steps they can take to protect their loved ones. Herman also makes himself available to answer any questions the families have. The non-profit provides those on the autism spectrum a chance to experience life to the fullest by offering cognitive-focused activities, social outreach, scholarships, societal inclusion, and needs-based information.  This health and human services non-profit received a grant of \$2,000.	ReClif
Richard Poore RPM Wealth Management/Triad Advisors Georgia	Roswell High School Robotics Booster Club Inc  Richard has volunteered with the non-profit for the past year as a parent of a student participating in the club. The non-profit inspires students to pursue educational and career opportunities in science, technology, and engineering.  This education non-profit received a grant of \$625.	RHS Robotics Booster Club, Inc.
Russell Dudley Dudley Asset Management/Osaic Wealth Georgia	The Winner's Club of Calhoun  Russel has volunteered with the non-profit for 15 years and is a board member, treasurer, and general volunteer. The non-profit creates a caring community for children with or at risk of physical, mental, behavioral challenges and/or abuse, and reinforces the social values of the family structure. They provide them with mentoring, self-esteem building, a family support system, community involvement, and individualized tutoring to enhance their educational performance.  This health and human services non-profit received a grant of \$1,500.	Changing Gerden County for the before, one other at a time.
Jeffrey Browne BDL Advisors/Osaic Wealth Georgia	United Way of Northwest Georgia  Jeffrey has spent the past 10 years volunteering at the non-profit as a board member and finance committee member. The non-profit aims to improve lives, inspire donors, and unify the community by investing in education, basic needs, and health. The non-profit helps get children ready for kindergarten, reading at grade level by third grade, and graduating on time with skills to be career and life ready. They reduce long term need for food, housing, and utility assistance through like skills education and financial counseling, and they support prevention services, so youth and adults are healthy and avoid risky behaviors.  This health and human services non-profit received a grant of \$825.	United Way of Northwest Georgia

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Michael Nielsen IN Wealth Management/Osaic Wealth Kansas	Kansas Big Brothers Big Sisters  Michael has spent the past ten years being a big brother/mentor for his little, Desmond, since he was ten years old. He volunteers as a male mentor, providing an outlet for weekly physical activities to boost him both physically and mentally. As their bond grew, Michael became a consultant from school concerns to life lessons. His little brother became the first in his family to graduate from high school, and attributes that to Michael's relationship. There are many others in need of mentorship and the non-profit heroes to match the over 1,000 Kansas youths with positive role models.  This health and human services non-profit received a grant of \$10,000.	Big Brothers Big Sisters.
Brian Tamasi BTA Financial Group, Inc./Osaic Wealth Kansas	Kansas Gamma Alumni Association  Brian has volunteered with the non-profit for 21 years and helps oversee chapter activities, finances, and mentors undergraduate chapter members. The association strives to build balanced leaders for the world's communities by supporting and expanding academic programming and academic scholarships for students at Sigma Phi Epsilon at the University of Kansas.  This education non-profit received a grant of \$625.	SIGMA ALPHA EPSILON BE TRUE.
Justin Baxter Baxter & Associates/Osaic Wealth Kansas	Wichita Wagonmasters  Justin has volunteered with the non-profit for six years and has held various roles, such as board member, membership chair, head of fundraising, and event management. The non-profit is comprised of business owners dedicated to raising money for Good Life Grants. They give money to charities throughout the community, cook food for over 100 events throughout the town at no cost, and help the police department cook and deliver 250 full thanksgiving meals to families in need. Established in 2021, the Good Life Grants are committed to benefiting the quality of life for people in the Wichita area.  This civic association non-profit received a grant of \$1,500.	WICHITA WAGONMASTERS
Marshal Baggett Securities America Louisiana	KC Academy Sulphur, Inc.  Marshal volunteers two hours a week in the lunchroom and has done so for three years. The non-profit provides children with complex special needs a chance to learn because mainstream schools cannot meet their specific needs. The academy strives to make learning fun and dynamic so all students can accomplish their goals, which includes an outdoor life skills area for gardening, harvesting, preparing, and cooking.  This education non-profit received a grant of \$1,500.	KCAcademy kds created to shine

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Tom Webbert Webbert Financial Planning/Securities America Maryland	Baltimore Hunger Project  Tom has volunteered with the non-profit for two years by purchasing, packing, and providing bags of food for students and running food drives for supplies. The non-profit is dedicated to eliminating the growing problem of weekend childhood hunger by feeding bodies and minds. They bridge the gap between Friday and Monday by consistently providing weekend food packages to children identified as food insecure, in a compassionate and dignified manner. They also raise awareness about the effects of hunger by establishing partnerships with the community members, other organization, and decision makers.  This health and human services non-profit received a grant of \$2,500.	BALTIMORE HUNGER PROJECT FEEDING BODIES AND MINDS
Daniel Campos Campos Financial Group/Securities America Maryland	Child Justice, Inc.  Daniel has held many roles during the 10 years he has volunteered with the non-profit, including chair of the board, board member, super volunteer, vendor management, website recovery and redesign, marketing, and bookkeeping. The non-profit protects and advocates for children who have been abused or affected by family violence or coercive control. They support them and their protective parents and promote justice for them through legal services, community outreach, education, and policy recommendations.  This health and human services non-profit received a grant of \$2,500.	Child . Justice
Monica Brown Osaic Wealth Maryland	Fidos for Freedom  Monica is the co-director of the non-profit and has volunteered with them for 11 years. She has been a therapy dog handler, training class leader, and vacation home provider for service dogs in training. The certified assistance dogs are trained and given to veterans with combat-related PTSD, mobility impairments, and hearing loss to improve their quality of life. Therapy dogs are also provided to support and comfort those in the healthcare/educational/first responder settings.  This health and human services non-profit received a grant of \$7,500.	FINS FOR FREEDOM
Harold Hunt Delmarva Financial Group/Osaic Wealth Maryland	Joey Sudo Memorial Fund Inc.  Harold has volunteered at the non-profit's largest fundraiser golf tournament for ten years. The fund is a tribute to Joey Sudo's perseverance during his long struggle with cancer and is dedicated to educating the public about the needs of families whose members struggle with serious, life-threatening, or terminal illness, as well as provide financial assistance to promote their ability to cope with difficulties.  This health and human services non-profit received a grant of \$825.	

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Eric Gaisford InFocus Financial Strategies/Securities America Missouri	Dogwood Ranch Corp  Eric has volunteered with the non-profit for eight years in many ways, currently serving as the Chairman of the Board. He also volunteers for multiple fundraising events throughout the year. The ranch rebuilds generations and breaks the cycle of trauma by restoring the one. They offer two programs that serves trauma survivors: The Haven, which is a transitional living program, and Healing Reigns, that is a mental health base equine therapy program.  This health and human services non-profit received a grant of \$1,500.	DOGWOOD  EST. RANCH 2005
James Morton  Morton Financial Solutions, LLC/Securities  America  Missouri	NEMO Senior Citizens Services, Inc.  James has volunteered with the monthly pickup of local food donations and items from local grocery stores to deliver to the non-profit's nutrition center, and delivers meals to homebound senior citizens. The non-profit provides social, recreational, and life-supporting services that enable seniors and adults to maintain their independence and remain in their homes for as long as safely possible.  This health and human services non-profit received a grant of \$625.	NEMO Senior Citizens Services, Inc.
Abigail James-O'Quinn James Financial Partners/ Osaic Wealth Missouri	Ozarks Literacy Council  Abigail has volunteered at the non-profit for three years and serves as the treasurer, board member, and classroom reader. The non-profit promotes literacy by providing free resources to adults and children in Southwest Missouri. They provide a year-round tutoring program and a classroom reading program operating through Springfield Public Schools throughout the school year.  This cultural non-profit received a grant of \$1,000.	Ozarks Literacy Council
Karen Boykin Westward Financial Strategies/Osaic Wealth Missouri	Shelter Friends - St. Charles, MO  Karen has dedicated eight years volunteering with the non-profit with fundraising and adoption events. The non-profit promotes the health and welfare of homeless animals in the Midwest. They are not a rescue group, but shelter assistance and networking group who help homeless pets find rescue or adoption.  This civic association non-profit received a grant of \$1,000.	Town of the same o

Nominator	Charity	Website
Justin Perri HomeTrust Investments/Osaic Institutions North Carolina	Angels & Sparrows  Justin has been involved with the non-profit for a year, where he volunteers reaching financial literacy to Middle and High School aged youth. This non-profit serves low income, food insecure families in North Mecklenburg County.  This education non-profit received a grant of \$1,000.	ANGELS® SPARROWS
James Staples Opus Financial Advisors/Osaic Wealth North Carolina	Children's Homes of Iredell County  James has volunteered with the non-profit for the past eight years, and has held multiple positions on the board, most recently the chair. The non-profit provides a safe and nurturing home-like environment for transitional-aged foster care youth in North Carolina. These children will learn skill building and give them the potential to thrive.  This health and human services non-profit received a grant of \$2,000.	Children's Homes OF IREDELL COUNTY  ANY DOOR CAN OPEN A HOUSE. ONLY A SPECIAL DOOR CAN OPEN A FUTURE!
Justin Perri HomeTrust Investments/Osaic Institutions North Carolina	Kamp Kiwanis Childrens Foundation Inc.  Although Justin has only been involved with this non-profit for a year, he has volunteered an impressive 150 hours to summer camp support, Davidson country fair support, and serves as a Key Club Committee Chair and Advisor. The Carolinas District of Kiwanis International provides summer camp experiences for disadvantaged children in the community. The club owns the fairgrounds and the 28-acre camp.  This civic association non-profit received a grant of \$2,000.	Kiwanis Club Lexington NC
NO PHOTO AVAILABLE  Kenneth Heaney Securities America North Carolina	Moore Free and Charitable Clinic  Kenneth has volunteered with the non-profit for five years as a donation solicitor, seeking medical supply donations for the clinic. The non-profit provides health services to the uninsured in the community and provides primary care services at low no cost to eligible adult residents for Moore County. Every dollar donated provides over \$35 in health services. This service helps relieve local hospital emergency rooms of patient cases.  This civic association non-profit received a grant of \$500.	MOORE FREE & CHARITABLE CLINIC Healing Hands. Caring Hearts.
Marianne Carter Chadwick Bay Investments/ Osaic Wealth North Carolina	Share the Table, Inc.  Marianne has volunteered at this non-profit for seven years by organizing food collections for the community and raising awareness of food insecurity. She is looking to expand her role by developing a financial program to educate clients on how to budget and buy food economically and to budget for other expenses.  This health and human services non-profit received a grant of \$1,000.	Share the Table

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James Staples Opus Financial Advisors/Osaic Wealth North Carolina	Special Treasures of Iredell County, Inc.  James has volunteered with the non-profit for ten years, sitting in the board of directors, fundraising, and financial advisor for the board. The non-profit employs, trains, and mentor youths that are currently in or have aged out of foster care, so they become productive, successful, employable adults. Their unique model attempts to remove the major barriers they face, which is crucial for their assimilation into society. They have helped over 150 youths.  This health and human services non-profit received a grant of \$2,000.	SPECIAL TREASURES VALUE FOR YOU. A FUTURE FOR OUR YOUTH.
Will Smith Capitol Financial Solutions/Osaic Wealth North Carolina	Wake Technical Community College Foundation  Will has served as the Investment Committee chairman and Incoming Foundation Board for the non-profit for four years. The foundation believes in making education possible for anyone in the community who wants one so the region remains the best place to live and work in the world. They strive to become a dynamic community college foundation with the relationships and resources necessary to fulfill the unmet needs of Wake Technical Community College.  This education non-profit received a grant of \$2,000.	WAKE   TECH
Bryan Stanfill Financial Strategies of Lake Norman, Inc./Triad Advisors North Carolina	Watchmen of the Streets/Habit Missions  Over the past year, Bryan has volunteered with the non-profit by donating and handing out donated meals, funds, tents, sleeping bags, clothing, and canned goods to the homeless. The non-profit provides emergency supplies and aid to their homeless neighbors and families.  This health and human services non-profit received a grant of \$1,000.	WAITICHMEN, OF TIHIE STREETS
Dustin LaPorte LaPort Wealth Management Group/American Portfolios Financial Services South Carolina	Girl Scouts of Eastern South Carolina  Dustin serves on the board of directors and has also served as treasurer and head of the investment sub-committee chair for three years for the non-profit. Girl scouting builds girls of courage, confidence, and character, who make the world a better place.  This civic association non-profit received a grant of \$625.	<b>girl scouts</b> of eastern south carolina

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Michael Jones Midlothian Wealth Management/Osaic Institutions Virginia	Central Virginia Lions Hearing Aid Bank  Michael has volunteered with the non-profit for six years, and currently serves as the president. He currently travels to other Lions Clubs to educate them about the organization. The non-profit helps people in need of hearing aids who cannot afford to pay retail prices for hearing aids by collecting used hearing aids and reconditions them to like-new condition and given to testing audiologist for fitting the patient.  This health and human services non-profit received a grant of \$4,000.	THE PRINTING THE P
Emily Robbins Virginia Asset Group/Osaic Institutions Virginia	Girls on the Run, Hampton Roads  Emily has volunteered with the non-profit for six years and has been on the board of directors and currently sits on the board of director Emeritus. She assists with strategic planning, budget development, fundraising, volunteer recruitment, evaluations, and fiscal operational response. The non-profit inspires girls to be joyful, healthy, and confident using fun, experience-based curricula that creatively integrates running. The girls meet twice a week after school and learn concrete strategies for positive social, emotional, and physical development, and improve their self-esteem, relationships, nutrition, fitness, and civic service.  This civic association non-profit received a grant of \$1,000.	Girlson the Fun tamptan Roads
Cortney Heykoop Clover Leaf Wealth Strategies/Osaic Institutions Virginia	The Arc of Loudoun  Cortney has volunteered with the non-profit in many roles over eight years, including board secretary, executive committee, finance committee, new home committee, development committee, and Arc's advocacy center. In addition, she works directly with adults with disabilities at various levels of capacity to help manage and understand their finances. The non-profit was founded by parents with a vision for their children with disabilities to live "a life like yours", and advocate for, educate, serve, and support people with disabilities and their families.  This health and human services non-profit received a grant of \$2,000.	The Arc.
Darin Ely Virginia Asset Group/Osaic Institutions Virginia	The Safe House Project  Darin has volunteered with the non-profit for six years and serves on the board, where he is responsible to approved budgets, setting compensation for executives, advising and approving contractual partnerships, fundraising, and advising on the strategic vision of the organization. The non-profit increases survivors of trafficking identification beyond one percent through education, emergency services and placement to survivors, and ensure every survivor has access to safe housing and holistic care by accelerating safe house capacity and development across America. They aim to unite communities to end domestic sex trafficking and restore hope, freedom, and a future to every survivor.  This health and human services non-profit received a grant of \$1,500.	SAFE HOUSE