





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






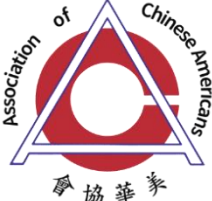


Grant Recipients are listed below in alpha order of their state



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
 <p>Karen Weible Osaic Wealth Illinois</p>	<p>Alt-Wood Area Zonta Foundation</p> <p><i>Karen has volunteered with the non-profit for 12 years and helps with fundraising and delivering donated items. The foundation is comprised of professionals who empower women worldwide through service and advocacy.</i></p> <p>This civic association services non-profit received a grant of \$825.</p>	
 <p>Kenneth Pawula Pawula Financial Group/Osaic Wealth Illinois</p>	<p>Chicago Zoological Society</p> <p><i>Kenneth has been an associate with the Junior Board and has also volunteered with the KINGS program and holiday events for four years. The society teaches zoo guests how interlinked humans are with other creatures and environments in the world. They strive to encourage people to take informed, responsible environmental actions to preserve biodiversity for generations to come.</i></p> <p>This civic association services non-profit received a grant of \$1,000.</p>	

Nominator	Charity	Website
 <p>Joseph Velez JPV Financial/Osaic Wealth Illinois</p>	<p>Grayslake Youth Baseball Association (GYBA)</p> <p><i>Joseph has volunteered as a special advisor to the board for six years and has coached over 12 seasons of baseball, and serves as the Mustang Director and Travel Director for Grayslake Youth Baseball. The community-focused organization supports the development of youth, both on and off the field. They teach sportsmanship, teamwork, inclusivity, community, and diversity and prioritize the player experiences and development over all other outcomes.</i></p> <p>This civic association services non-profit received a grant of \$625.</p>	
 <p>Dale Tieman Peru Federal Savings Bank/Osaic Wealth Illinois</p>	<p>Illinois Valley Regional Fire Training Facility Organization</p> <p><i>Dale has volunteered at the non-profit for 15 years and currently serves as the president of the organization. The non-profit is organized under the laws of the state of Illinois for those primarily engaged in firefighting in the City of La Salle, Peru, and County of La Salle. The enrichment programs and educational opportunities are for area fire personnel with live fire burning training.</i></p> <p>This civic association services non-profit received a grant of \$1,500.</p>	
 <p>Alan Nerad Alera Group/Triad Advisors Illinois</p>	<p>Lincolnshire Rotary Charitable Fund, Inc.</p> <p><i>Alan has volunteered with the non-profit for 20 years and has served as the president of the organization multiple times. The organization initiates and supports humanitarian efforts with the local community and internationally, including the Rotary Foundation, the Riverside Foundation, Shore Community Services, CASA, and Alzheimer's Association.</i></p> <p>This civic association services non-profit received a grant of \$1,500.</p>	 <p>Rotary Lincolnshire Morning Star District 6440 Illinois · USA</p>
 <p>Mohammed Esmail Esmail Financial Strategies/Woodbury Financial Illinois</p>	<p>Lombard District 44 Education Foundation</p> <p><i>Mohammed has volunteered with the non-profit for three years and currently serves as the president. Taking over after Covid, Mohammed has taken charge of recruitment and re-establishment of the foundation. It serves as a strategic partner with the district to foster connections between the classroom and local community. They strive to provide students and teachers with community-based learning projects.</i></p> <p>This education services non-profit received a grant of \$1,000.</p>	







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 <p>Kelly O'Malley Oak Brook Wealth Management/ Osaic Wealth Illinois</p>	<p>Marklund Children's Home</p> <p><i>Kelly's has volunteered her time for three years with the non-profit. Their mission is to make everyday life possible for individuals with profound disabilities. Kelly has demonstrated a canine companion at the home and has brought joy to the residents, both adults and children in the community.</i></p> <p>This health and human services non-profit received a grant of \$2,000.</p>	
 <p>James Kim The Pinnacle Planning Group, LLC/Triad Advisors Illinois</p>	<p>New Community Outreach</p> <p><i>James has volunteered for the non-profit for 8 years and became a board member this year. His responsibilities over time have included helping with the garden that provides free fresh produce to the community, and assisting with the annual back to school funfair. The community-based non-profit is committed to Bronzeville's youth and community to create restorative spaces for healing, reconciliation, and flourishing.</i></p> <p>This health and human services non-profit received a grant of \$2,500.</p>	
 <p>Sheila Baker Equity Design Group/Osaic Wealth Illinois</p>	<p>The National Council of the United States, Society of St. Vincent de Paul, Inc</p> <p><i>Sheila has volunteered with the non-profit for eight years to help her community. She works alongside "Neighbors in Need," where they meet one-on-one with those in need to understand their situations, and they provide assistance to those with temporary setbacks such as job loss, car repair, or illness and help them make utility and other payments to not jeopardize their lives.</i></p> <p>This health and human services non-profit received a grant of \$500.</p>	
 <p>Geralyn Jover CPA Tax Services Inc./Osaic Wealth Illinois</p>	<p>University of the Philippines Silak Silab Foundation</p> <p><i>Geralyn has volunteered for the non-profit for 18 years, serves on its board of directors and helps to raise money for student scholarships. She recruits new members and is very active in reaching out for support from the public. The foundation liberates poor but deserving students from poverty through the access of education by providing financial assistance.</i></p> <p>This education services non-profit received a grant of \$1,500.</p>	

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 <p>Everardo Rodriguez Performance Financial Group LLC/Osaic Wealth Indiana</p>	<p>Outfitters Inc</p> <p><i>Everardo serves as a board member and has volunteered in its store organizing shelves for three years. The non-profit provides new and gently used clothing to school-aged children in need. All shopping is done by appointment to ensure client privacy.</i></p> <p>This health and human services non-profit received a grant of \$825.</p>	
 <p>Stacey Bouse Wealth Strategies Inc/Osaic Wealth Indiana</p>	<p>The Soup Kitchen of Muncie</p> <p><i>Stacey has volunteered at the non-profit for the past year, where she prepares meals and washes dishes each week. The soup kitchen feeds the hungry of the Muncie community with dignity and respect, without regard to race, gender, sexuality, or religious preference. They ensure that all people can access healthy food and make connections with community services to support their social and emotional wellbeing.</i></p> <p>This health and human services non-profit received a grant of \$1,000.</p>	
 <p>Elinor Ho Secure Planning Strategies/Securities America Michigan</p>	<p>Association of Chinese Americans, Inc.</p> <p><i>Elinor has volunteered 30 hours per week for the past 5 years serving as the president and board chair for the non-profit, which is dedicated to advancing the social, educational, political, and economic well-being of Asian-Pacific Americans in the United States.</i></p> <p>This civic association non-profit received a grant of \$1,500.</p>	
 <p>Jeffrey Bearance Michigan Financial Companies/Osaic Wealth Michigan</p>	<p>Elizabeth's Closet</p> <p><i>Jeffrey as volunteered for the past 4 years with any duties assigned, primarily obtaining items for silent auctions, fundraising, and advertising. The non-profit raises funds to assist the Beaumont Infant Bereavement Program, which creates memory boxes that are given to parents who are dealing with the loss of a child. They also help to support those who need ongoing grief counseling.</i></p> <p>This health and human services non-profit received a grant of \$1,000.</p>	

Nominator	Charity	Website
 <p>Iuliana Keyes VIM Capital/Osaic Institutions Michigan</p>	<p>Ferncare</p> <p><i>Iuliana has volunteered with the non-profit for two years and serves as a board member. She contributes to growing the footprint of the organization and providing those in need with access to the free clinic. The health services are provided at no cost for medically uninsured people between the ages of 19 and 64. Services are also provided to assist anyone in finding health insurance if they choose.</i></p> <p>This health and human services non-profit received a grant of \$1,000.</p>	
 <p>Iuliana Keyes VIM Capital/Osaic Institutions Michigan</p>	<p>Take Root, Inc.</p> <p><i>Iuliana has volunteered with this non-profit for six years and volunteers with classes offered. The non-profit provides the community performance and outreach programs to impact lives through dance. The art of movement and dance is offered to everyone to support inclusiveness and diversity. The non-profit offers a program to those with Parkinson's Disease and their caregivers to participate in movement classes.</i></p> <p>This health and human services non-profit received a grant of \$2,000.</p>	
 <p>Mark Drouillard Wealth Management Plus/Securities America Michigan</p>	<p>Therapy Ranch</p> <p><i>Mark has volunteered with the non-profit for four years, about 10 hours per month, managing their budgets and finances, and by fundraising and performing maintenance at the horse facility. The non-profit assist U.S. Veterans and metro Detroit youth with equine assisted mental health therapies.</i></p> <p>This health and human services non-profit received a grant of \$625.</p>	
 <p>Mark Heisey Arbor Group Advisors/Securities America Michigan</p>	<p>Wheels Over Michigan Bike-A-Thon</p> <p><i>Mark has volunteered with the non-profit for eight years by participating in their week-long bike ride and fundraising. The non-profit supports three ministries in Haiti: Team Teach Haiti which inspires Haitian teachers to develop skills in best educational practices, Haiti Bible Institute which gives trains pastors for the rapid growth of their church, and Vision 4 World which assists missions with medical clinics open to all.</i></p> <p>This health and human services non-profit received a grant of \$500.</p>	

Nominator	Charity	Website
 <p>Michael Branch Focus Financial/Securities America Minnesota</p>	<p>Can Do Canines</p> <p><i>Michael has held many positions over the past five years for the non-profit, including board member, fundraiser, marketing communications, content creator, photographer, and general volunteer for events. The non-profit is dedicated to enhancing the quality of life for people living with disabilities by creating mutually beneficial partnerships with specially trained dogs.</i></p> <p>This civic association non-profit received a grant of \$1,500.</p>	
 <p>Keith Meyers Advanced Financial Consultants/Securities America Minnesota</p>	<p>John Burch Park Supporters</p> <p><i>Keith has volunteered at the non-profit for 23 years and serves as the secretary and fundraising chair. This non-profit strives to maintain and improve the John Burch Park ballpark and facility. This park is one of the hubs of the Cannon Falls Community where high school, legion, VFW and Bears baseballs games are hosted in the spring and high school football games in the fall.</i></p> <p>This civic association non-profit received a grant of \$825.</p>	
 <p>Tom Hokr MHS Companies/Osaic Wealth Minnesota</p>	<p>Minnesota Military Family Foundation (MMFF)</p> <p><i>Tom founded the non-profit 11 years ago and serves as the CEO of the board and operations. The community-supported foundation is governed by an all-volunteer board, and contributions are made by people who understand the many sacrifices that military families make. The foundation distributes money through grants to Minnesota military families that need assistance for specific causes that occur when a family member is deployed, providing a financial safety net.</i></p> <p>This civic association non-profit received a grant of \$2,000.</p>	
 <p>Peter Haagenson Focus Financial/Osaic Wealth Minnesota</p>	<p>My Very Own Bed</p> <p><i>Peter has donated to the non-profit for two years and has started to volunteer with them. The non-profit provides new beds and linens to the children of families who have recently secured stable housing.</i></p> <p>This health and human services non-profit received a grant of \$500.</p>	

Nominator	Charity	Website
 <p>Timothy Johnson USAdvisors Wealth Management/Securities America Minnesota</p>	<p>United Way of Douglas & Pope Counties</p> <p><i>Timothy has volunteered with the monthly food drop of the non-profit for four years, about 12 hours per month. He also coordinates the setup for Back Pack Attack in Pope County and serves on their allocation committee. The non-profit changes the game by connecting people, resources, and ideas to promote individual self-sufficiency through investments in health, education, and financial stability.</i></p> <p>This health and human services non-profit received a grant of \$1,000.</p>	 <p>United Way of Douglas & Pope Counties</p>
 <p>David Mann LifeGuide Financial Consultants/Securities America Minnesota</p>	<p>Fargo Area Sports</p> <p><i>David volunteered for the non-profit for five years, 5-7 hours per week, serving on its board and has volunteered as a coach. The non-profit serves the community by basing every decision on kids first, coaches and parents second, followed last by the needs of the organization. They build a passion for sports, building good people, and providing a competitive and safe environment for the athletes.</i></p> <p>This civic association non-profit received a grant of \$1,500.</p>	<p>FARGO AREA SPORTS</p>
 <p>Martin Andreasen True North Advisory Group/Osaic Wealth Minnesota</p>	<p>In a Perfect World Foundation</p> <p><i>Martin has volunteered with this nonprofit for 17 years, about 10 hours per quarter, serving on its Advisory Board and sharing his financial services expertise with its fundraising efforts. IAPW's youth empowerment programs use an evidence-based 12-week curriculum for youth aged 5-18 to develop social-emotional learning (SEL), 21st-century skills, and competencies.</i></p> <p>This education non-profit received a grant of \$1,000</p>	
 <p>Roxanne Waterman Waterman Wealth Strategies/Securities America Oregon</p>	<p>Soroptimist International to The Americas Inc</p> <p><i>Roxanne has held several board member positions over the 12 years, serving about 3 hours per week with the non-profit. She is a charter member and promotes the vision of the non-profit, which is for women and girls to have the resources and opportunities to reach their full potential and live their dreams by providing educational programs, supporting women's shelters, and providing awareness to combat the issue of human trafficking.</i></p> <p>This civic association non-profit received a grant of \$1,000.</p>	

Nominator	Charity	Website
 <p>Kathy Wilson Securities America/Osaic Institutions South Dakota</p>	<p>Border Paws Dog Rescue</p> <p><i>Kathy has volunteered at this non-profit two-to-three times a week for the past two years. The non-profit is focused on saving dogs from very over-populated areas of the south and finding them a forever home after being vetted. They also educate the local community on dog rescue and adoption.</i></p> <p>This civic association non-profit received a grant of \$1,500.</p>	
 <p>Layne Bruner Harbor Investment Advisors/Osaic Wealth Washington</p>	<p>Multi-Sport 360</p> <p><i>Layne founded the non-profit two years ago and serves as the president. The community program serves small town suburban communities and surrounding rural communities, most of which fall below the poverty line. It offers a local and reasonably priced option for training young athletes to develop life skills through sports.</i></p> <p>This civic association non-profit received a grant of \$2,000.</p>	
 <p>Kyle Temple Mirus Planning/Osaic Wealth Washington</p>	<p>Poynter Foundation</p> <p><i>Kyle is a founding board member and has been involved for three years. The foundation provides financial support to single parents to complete higher education goals, as well as emotional support networks.</i></p> <p>This education non-profit received a grant of \$825.</p>	
 <p>Alan Foeckler Choice Advisors/Osaic Wealth Wisconsin</p>	<p>Hayward Youth & Rescue, Inc. (HYR Inc.)</p> <p><i>Alan has dedicated 20 years volunteering at the non-profit by fundraising and working with youth in the region to achieve their full potential through supporting them in the Civil Air Patrol. The non-profit provides funds to those who would not be able to access the camp without assistance.</i></p> <p>This health and human services non-profit received a grant of \$1,500.</p>	
 <p>Kendall Bryce Pronghorn Wealth Management/Osaic Wealth Wyoming</p>	<p>Casper Family YMCA</p> <p><i>Kendall has volunteered with the nonprofit for ten years and sits on the board of directors. He has also served as the board president. The non-profit works to address critical needs that help children develop into smart, resilient adults, and to improve the health of those in the community.</i></p> <p>This civic association non-profit received a grant of \$625.</p>	