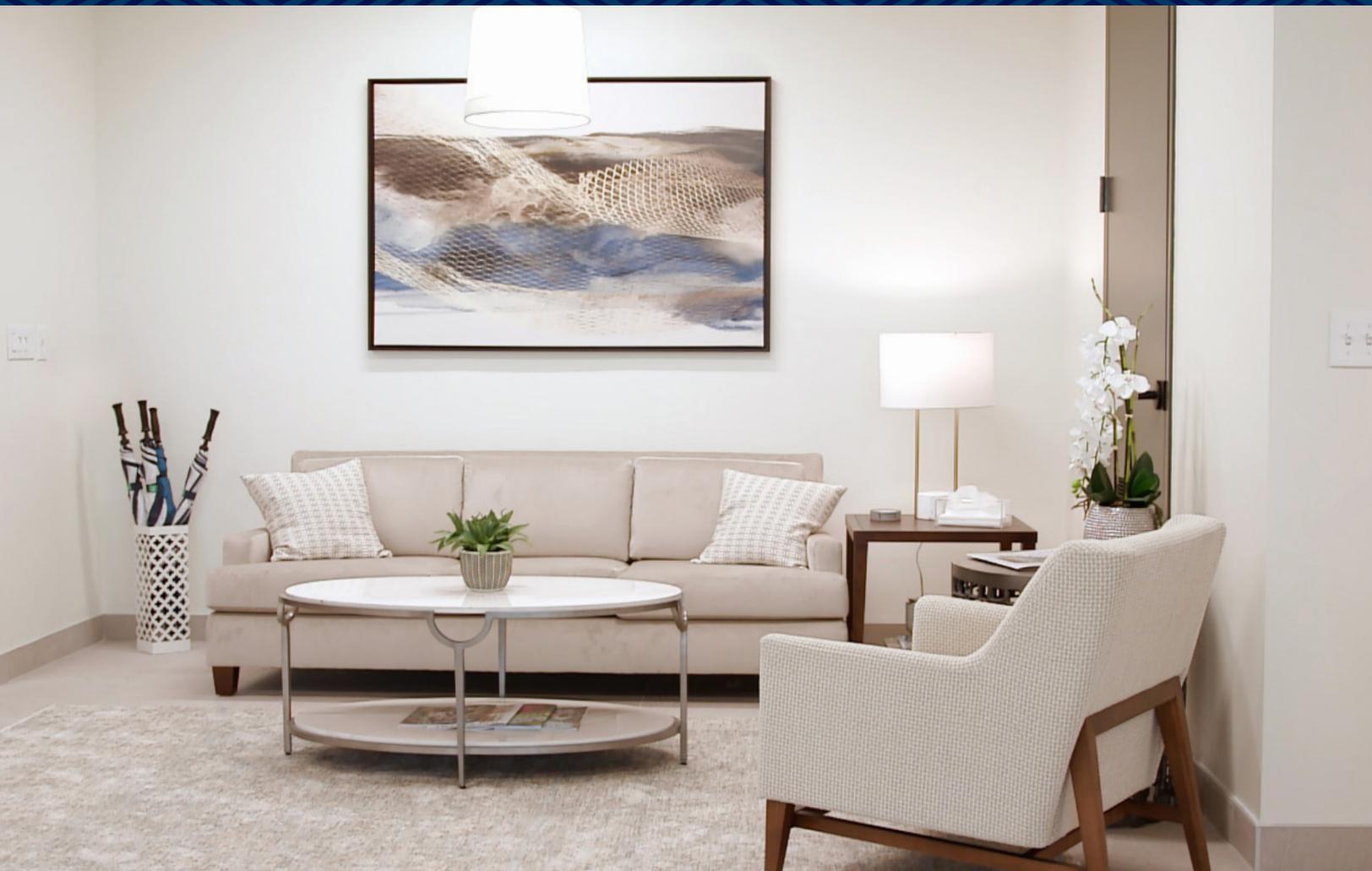


# PURPOSEFUL DESIGN FOR A HIGHER PURPOSE

For Carnegie Private Wealth, designing an ideal office space meant creating an environment that reflected their values and approach to serving clients





## CARNEGIE PRIVATE WEALTH:

# A JOURNEY TO SUPPORTED INDEPENDENCE



## MEET CARNEGIE PRIVATE WEALTH

**AUM:** \$1.45B\*

**Founders:** Angie Ostendarp, Jordan Raniszkeski, and Mary Ware

**Office Location:** Charlotte, North Carolina (South Park area)

### Why Carnegie Private Wealth chose to break away:

- To create a positive culture for their team
- To engage clients in a way that was meaningful—and do more than just asset allocation
- To create a family-oriented practice
- To allow advisors flexibility to coach their clients on financial matters vs. just being traditional money managers

Angie Ostendarp, Jordan Raniszkeski, and Mary Ware recognized their time at their previous firm was coming to an end. They felt constricted in their ability to continue to grow their business and expand their client base, they were limited in how they could engage and work with their own clients, and they had no ownership of business decisions. Breaking away was the only way they could realize their vision for the future.

The trio, along with tuck-in advisors Jeff Vandiver and Mitch Mayfield, began an extensive search for a wealth management firm that would give them the autonomy, flexibility, and independence they wanted. In 2022, they chose to join LPL Financial's Strategic Wealth Services, which would allow them to run their business on their own terms, while benefiting from a high level of support and guidance. "We considered other options in terms of going independent and building our own firm," said Raniszkeski. "But no other place offered the type of full support LPL Strategic Wealth Services provides."

This full support includes:

- A startup team that facilitated their entire business launch and transition to LPL, helping them get their business up and running
- An ongoing strategy team that focuses on their growth by creating and executing strategies for acquisitions, hiring staff, expanding into new markets, reviewing profitability, and more
- A service and support team that handles or facilitates any of their day-to-day business needs, including operations, office administration, and technology support

Ostendarp, Raniszkeski, and Ware launched Carnegie Private Wealth, in Charlotte, North Carolina, and have never looked back. They were delighted with the launch experience, which includes Strategic Wealth Services' real estate offering. They utilized the expertise of the real estate team to guide them through every stage of the process; from locating an office space and designing it, to managing the construction, procurement, and build out of the new space to align with their firm's vision: "Wealth for a higher purpose."

# AN ENGAGING, FULFILLING REAL ESTATE PROCESS



The Carnegie Private Wealth team knew the value that a highly customized space could bring to their practice. They wanted a space that not only supported their growth goals but one that could truly change the way they engaged with current and prospective clients. They also knew that bringing a vision like that to life could be a big undertaking. “There were so many aspects of a move like ours that we had to consider,” said Ware. “Negotiations with the landlord, a space planning design, furniture.”

That’s where the Strategic Wealth Services real estate team shined—putting Ware and her partners’ minds at ease through every stage of the process.

## Discovery

The real estate team began by working closely with Carnegie to determine their vision, must-haves, and wish-list items. These included:

- A location close to current and prospective clients
- Space to host in-office client and center of influence events
- Ability to virtually support clients and prospects who live outside of Charlotte
- Extra space to support immediate and future growth and advisor headcount
- Collaborative working spaces

“The team that we worked with really took the time through various surveys and meetings to understand our priorities, vision, and values and how we wanted to show up in the marketplace,” said Ware. “It wasn’t just talk to us once and then here’s your two ideas to pick from. It was, let’s have three or four conversations about who you are as advisors, who you are as people, what your market is like.”

## Survey and assessment

The real estate team and a local real estate agent sourced potential sites and scheduled tours to select the ideal space, while always protecting the team’s identity during this sensitive time. Carnegie benefited from the team’s expertise, and it allowed them to stay focused on serving their clients and prospects throughout their transition to LPL.

## Negotiation

The real estate team oversaw all aspects of negotiating the space. Carnegie was excited about their agreed-upon terms and a number of negotiation wins, including:

- First right of refusal to expand into additional office space
- Temporary office accommodations (free of charge) due to an elongated build-out timeline
- Permission to use the Carnegie Private Wealth name and brand on the exterior of the office building



## Why Carnegie Private Wealth chose Strategic Wealth Services:

- Simplified pricing, curated technology, and dedicated support to launch their practice at LPL
- Ongoing operations support managed by a team of experienced professionals, including a business strategist, marketing partner, CFO, and administrative assistant
- One point of contact and dedicated resources, ultimately allowing them to stay focused on the needs of their clients, culture, and the evolution of their practice



### Optimizing the space

The Carnegie founders found this part of the process to be the most fun and rewarding. They worked hand-in-hand with a specialized design team to ensure their office design was built to their exact needs and supported how they preferred to work with clients and prospects. It was the intersection of where function meets beauty.

Carnegie and the specialized design team ensured the office would be warm and inviting, easily lend itself to collaboration, be tech-savvy, and immediately make use of the extra space in creative ways, while also planning for future organic and inorganic growth. They configured different layouts, mixed and matched colors, picked furniture and accessories, and ensured that every part of the office was aligned with their expectations.

“It was really great to select every stitch of fabric, every stick of furniture, and every piece of technology that we have in the office,” said Raniszkeski.

### Build and construction

Carnegie also benefitted from the real estate team taking on general contractor responsibilities, managing everything from construction and signage to office furniture delivery and set-up. After construction was complete, the real estate team orchestrated every element of the move from their temporary space—including the critical technology requirements. The team made sure all computers, phones, and security were connected and working properly so that the business was ready to be up and running with no interruptions.

Thanks to a seamless process, Carnegie was serving its clients and running operations as usual the day the office opened in June 2023.



### Ongoing support

Carnegie’s new space strikes the balance the founding advisors expected—an intimate, technology-advanced setting with plenty of room for continued growth.

“We’re really proud of it and we’re so excited,” Ostendarp said. “I think it’ll feel a little bit like home and not just like an office—that’s how we designed it.”

The Carnegie team also rests assured that Strategic Wealth Services will continue to support them as they grow and evolve. That means ongoing management of their phone systems, data security, office technology, and conference room technology. It could also include restructuring the lease agreement or redesigning part of their space.

That ongoing support will be appreciated because, according to Ware, “The office that we’re in is more than we could have imagined or asked for. It’s truly a space that I could see us being in for the next 10, 20 years.”



### How can you thrive with Strategic Wealth Services’ support?

**Strategic Wealth Services is well equipped to provide customized business management support through the startup, transition, and ongoing life of your business. To learn more, reach out to your Business Development consultant for a confidential conversation.**

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MC-000382-1023 Tracking #506350 (Exp. 11/2025)

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