SPIEGELMAN
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FOR IMMEDIATE RELEASE

Spiegelman Wealth Management Launches Independent RIA Firm to Serve HNW Families

Family-run wealth management firm in East Bay leaves Commonwealth Financial Network® to pursue next chapter of growth, more personalized services for clients

ALAMO, Calif. (July 14, 2025) – Adam Spiegelman, a former investment adviser representative through Commonwealth Financial Network®, today announced the official launch of Spiegelman Wealth Management, Inc., as a newly independent SEC-registered investment advisor (RIA) based in the East Bay. The firm will serve high-net-worth individuals, families, and business owners, with a focus on delivering comprehensive, fee-only financial planning and investment management.

Spiegelman and the team previously managed approximately $400 million in client assets and bring more than 75 years of combined experience in financial planning and wealth management. The family-run business was started by Alan Spiegelman, Adam's father, in 1989 as a unit of Northwestern Mutual before affiliating with Commonwealth in 2018 for back-office support.

"After years within larger institutions, we saw an opportunity to create something fully independent—an environment where we could deliver more personalized, responsive service tailored to each client's needs," said Adam Spiegelman, a wealth advisor who joined the practice in 2003 and has led it since 2014. "Gaining the autonomy to expand our technology platform and introduce new investment strategies—free from outside constraints—has been a long-standing vision of mine, one that ultimately strengthens our client relationships."

Spiegelman Wealth Management will custody assets with Fidelity Institutional Wealth Management Services. The firm's model is designed for clients seeking boutique-level service and highly customized strategies with a personal touch. The Alamo team consists of two wealth management and planning associates and a business development director.

"This is about shaping a firm that not only reflects what our clients care about but also adapts with them as their needs and aspirations grow," Spiegelman added. "For decades, clients have turned to us for thoughtful financial guidance. We're honored to continue that journey with them and build new relationships that carry their legacy forward."

To learn more about Spiegelman Wealth Management and its services, please visit www.spiegelmanwealth.com.

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About Spiegelman Wealth Management
Based in Alamo, California, Spiegelman Wealth Management, Inc., is an independent, fee-only advisory firm that serves individuals, families, and business owners seeking personalized financial planning and disciplined investment management. With a fiduciary commitment and focus on transparency, Spiegelman Wealth Management helps clients align their financial decisions with their goals, values, and long-term vision. Learn more at spiegelmanwealth.com.

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