Aspire Money Management

Protecting Their Clients' Future with Transparency and Trust.

"We believe in designing financial strategies that foster transparency and trust, helping our clients protect their future," says Amanda Mangum, Owner and Advisor at Aspire Money Management. "Through education and empowerment, we guide our clients through the complexities of their finances, creating customized plans through in partnership with them."

Aspire Money Management (AM2) is a comprehensive advisory firm dedicated to helping clients grow and protect their family wealth. The firm leverages advanced financial planning, generational vaults, income planning, retirement strategies, and tax solutions to help clients achieve financial freedom.

"Clients choose us because everything is handled in-house—from taxes and estate planning to trusts. This allows us to offer turnkey solutions all under one roof," Amanda explains.

Aspire Money Management begins with a deep understanding of each client's investment style and unique needs. With a team that includes both a CPA and an attorney, they seamlessly address every aspect of a client's financial life. This holistic approach enables them to offer a full suite of services, including estate planning, trust management, and tax planning—all conveniently within their office.

"It's critical to have estate documents, wills, and powers of attorney in place before making significant financial decisions to avoid pitfalls," Amanda notes.

Aspire Money Management often works with multiple generations within families, ensuring everyone is informed and prepared for the future since legacy planning is critical. They have seen situations where families had to go through probate, causing unnecessary delays and stress.

"Investors don't always understand what they've invested in. We help explain what they have and how it contributes to their overall financial picture," Amanda says.

By focusing on each client's needs and risk tolerance, Aspire Money Management delivers long-term growth and protection. The firm builds tailored investment portfolios for individuals and families, with strategies for retirement, insurance, and tax planning that make a significant impact on legacy wealth. They also manage trusts, LLCs, non-profit organizations, and employer/employee account management.

"When a client walks through our doors, we treat them like family and build genuine, one-on-one relationships," Amanda shares.

As a boutique firm, Aspire Money Management prides itself on its personal approach—clients always know who they're working with and never feel passed around. Regular reviews and ongoing communication ensure clients stay on track and achieve their goals.

Amanda Mangum

"We have a hometown feel with a downtown vibe," Amanda says, describing their office in downtown Fuquay Varina, North Carolina.

The firm serves three generations of families, helping them plan for the next five to ten years. In recent years, more clients in their 40s and 50s are proactively securing their financial futures, reflecting a growing awareness of the importance of early planning.

"I love my job so much that it never feels like work," Amanda says. "The relationships I've built—many with clients who have become close friends—are the most rewarding part of what I do. Helping people achieve financial success is truly my passion."

Aspire Money Management
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