

Aspire Money Management

Full-Service Retirement Planning For North Carolina

“If you’re serious about your financial future, we’re serious about helping you,” says Amanda Mangum, Owner of Aspire Money Management. “Our team works with pre-retirees and current retirees who want straightforward advice and are tired of high fees and low returns.”

Aspire Money Management is a boutique, locally rooted advisory firm emphasizing transparency, personalized service, and intergenerational planning. Led by Amanda Mangum, the firm helps clients create lasting legacies, not just manage money. As a Registered Investment Advisor, Aspire delivers advanced money management solutions using specialized portfolio strategies and software to proactively monitor and adjust accounts. Based in downtown Fuquay-Varina, Aspire proudly serves clients across North Carolina.

“At Aspire Money Management, we don’t just build financial plans, we build confidence for the road ahead,” Amanda says.

Using modern planning tools and ongoing industry knowledge, Aspire delivers a personal touch only a local firm can offer. Clients value the professionalism and genuine care from advisors, as well as attention to unique circumstances from retirement strategies and investment management to risk planning, budgeting, and long-term financial wellness.

“We believe every investor is unique,” Amanda explains. “We develop personalized approaches that consider your objectives, risk tolerance, time horizon, and income needs.”

Aspire builds close relationships to understand each client’s financial situation, offering asset allocation, risk management, income planning, life insurance, legacy planning, retirement strategies, and secure document storage through the Generational Vault.

Aspire operates as a fee-based company, charging a single fee for all financial advice and services regardless of how many trades are made. There are no commissions.

They also partners with Gradient Investments, LLC, a fee-only investment manager with distinct portfolio strategies and active risk management. Gradient’s portfolios include stocks, bonds, and ETFs, using separately managed accounts. Together, Aspire and Gradient address investment challenges through a proprietary system for managing risk exposure and long-term performance.

“Financial planning isn’t just about numbers, it’s about people, purpose, and the future they aspire to build. We listen first, plan second, and guide always.”

What Makes Aspire Money Management Different

- Holistic, In-House Services: Financial planning, tax strategies, estate planning, and trust work offered under one roof.



*Where financial strategy meets personal commitment
— Aspire Money Management.*

- Legacy & Generational Planning: Focus on building multi-generational legacies, supporting families with wills, trusts, and estate documents.
- Transparency: Clear, understandable planning.
- Education-Focused: Empowering clients for long-term understanding.
- Local Feel: “Hometown feel with a downtown vibe.”
Amanda says, “We want you to feel like family when you come into the office.”

As Fuquay-Varina continues to grow, Aspire Money Management remains a dependable financial partner, helping individuals and families pursue prosperous futures with confidence and clarity.



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