



Wellspring Family Office Named to Inaugural CNBC Elite Advisor List

Cleveland, Ohio — Wellspring Family Office has been named to the inaugural [CNBC Elite Advisor list](#), a first-of-its-kind recognition identifying 25 registered wealth management firms across the country with a proven track record of managing ultra-high-net-worth clients and providing the full suite of services required by today's wealthy clients and families.

The CNBC Elite Advisor list was not open to applications and carried no fee for consideration. CNBC's editorial team independently identified and evaluated firms based on the depth and quality of service they provide to ultra-high-net-worth families, not on assets under management, growth rate, or publicly available data.

Wellspring Family Office was founded in 2007 with a singular focus: to serve families with the full depth of expertise, integration, and care their lives demand as a true independent multi-family office.

"Serving families at this level requires depth, integration, and genuine care that goes well beyond the balance sheet. We have built our entire firm around that belief, and we are proud that CNBC recognized it," said Michael Novak, Founder and CEO of Wellspring Family Office.

Wellspring manages \$7 billion in wealth for ultra-high-net-worth families, maintains a 98% client retention rate, and operates with a 3:1 family-to-associate ratio, reflecting a deliberate approach to high-touch, personalized service.

About Wellspring Family Office

Wellspring Family Office is an independent, fee-only multi-family office serving ultra-high-net-worth individuals and families. Founded in 2007 by CEO Michael Novak and headquartered in Cleveland, Ohio, the firm provides integrated wealth and tax planning, investment management, family governance and education, trust and estate management, owner advisory, concierge, health and wellness services.

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