

# NIHTrust

Wealth Management  
Financial Advisors

*Plan Confidently.*

Annual Report 2025



## President's Letter

At NHTrust, we pride ourselves on the client-first approach we bring to each relationship. Our clients place great trust in us to help guide important financial decisions, and we are grateful for the opportunity to be a steady partner through every stage of life.

Over the past year, NHTrust continued to grow in meaningful ways. We welcomed new clients, strengthened our operations, expanded our team and invested in the future of our organization. Through it all, our focus stayed the same: offer thoughtful guidance, personal service and the local accessibility our clients value.

One of the most exciting developments this year has been the continued evolution of the NHTrust brand. We made strong progress on a brand refresh that better reflects who we are today and where we're headed. This work includes updated branding, stronger marketing efforts and a redesigned website that offers an improved client experience and helpful financial resources. We are excited to keep building a modern, recognizable brand that reflects the strength of our team and the personalized service we provide.

We also continued to invest in our people. In 2025, we were pleased to welcome Fabiana Pereira to NHTrust as Associate Wealth Advisor. Fabiana quickly became a valued member of our team, bringing experience, energy and a strong commitment to client relationships. This year, she was also promoted to Assistant Vice President, a reflection of both her contributions and bright future ahead.

We also recognized the retirement of Senior Vice President and Senior Wealth Advisor Greg McConahey, whose decades of dedication and leadership helped shape NHTrust into the organization it is today. Greg built lasting relationships with clients and colleagues alike, and we are deeply grateful for the care, professionalism and trust he brought to NHTrust throughout his career. We wish him all the best in retirement.

As an organization rooted in New Hampshire, we remain deeply committed to the communities we serve. Through giving, volunteerism and partnerships with local organizations, NHTrust continues to support programs and initiatives that strengthen our neighborhoods and improve quality of life across the region. We are honored to stand behind organizations that provide critical services, educational opportunities and community enrichment throughout New Hampshire.

Our growth this year reflects both the dedication of our team and the confidence our clients place in us. We are thankful for the progress we have made and remain focused on delivering the high level of service, expertise and personal attention our clients expect.

On behalf of everyone at NHTrust, thank you for your continued trust and partnership. We are grateful for the opportunity to serve you and look forward to all that is ahead.



Cydney Shapleigh  
President



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pride ourselves  
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to each relationship.

## Community

At NHTrust, we believe strong communities are built through partnership, care and a shared commitment to helping others thrive. Supporting local organizations is an important part of who we are, and we are committed to investing in programs that strengthen health, education, well-being and quality of life across New Hampshire.

In 2025, we contributed more than \$45,000 to nonprofit organizations and community initiatives statewide. Beyond financial support, members of our team also gave their time and talents to organizations, making a meaningful difference every day. We are grateful for the opportunity to support causes that reflect our values and make a positive impact on individuals and families across our communities.

### Boys & Girls Clubs of Central and Northern New Hampshire

NHTrust supported the Boys & Girls Clubs of Central and Northern New Hampshire and their mission to help young people reach their full potential. Through educational programs, mentorship and after-school opportunities, the organization provides a safe and supportive environment for youth throughout the region.

### Red River Theatres

As Concord's nonprofit independent cinema, Red River Theatres brings the community together through film, education and the arts. We were glad to support an organization that creates opportunities for cultural connection, thoughtful conversation and shared experiences in the Capital Region.

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### Greater Lakes Region Children's Auction

The Greater Lakes Region Children's Auction continues to make a lasting difference for children and families throughout the Lakes Region. Through fundraising and broad community support, the organization provides critical resources to local nonprofits serving children in need. We are honored to support their mission and the many lives they touch each year.

### Keene Family YMCA

The Keene Family YMCA plays an important role in promoting healthy living, youth development and social responsibility in the Monadnock Region. We were pleased to support programs and services that help individuals and families of all ages build stronger, healthier communities.

### The Community Kitchen

The Community Kitchen works every day to address hunger and food insecurity in the Monadnock Region by providing nutritious meals, groceries and community support services. NHTrust is grateful for the opportunity to support an organization that helps neighbors in need with dignity and compassion.

### Belknap Special Operations Group

We were pleased to support the Belknap Special Operations Group and their commitment to public safety throughout the Lakes Region. Their work helps ensure local first responders have the specialized training and equipment they need to protect and serve our communities in critical situations.



## Financial

	2025	2024	2023
Assets Under Administration	\$1.5B	\$1.4B	\$1.1B
Gross Revenue	\$8.2M	\$7.7M	\$7.3M
Net Income	\$800K	\$402K	\$544K

# Our Team

## President




**CYDNEY SHAPLEIGH, CTFA®**  
President, NHTrust


## Wealth Management Services




**MICHAEL ST. ONGE, CIMA®, CPWA®**  
SVP, Senior Wealth Advisor




**PAUL M. PROVOST, CFP®**  
SVP, Senior Wealth Advisor



**TONI CIAMPAGLIONE, CFP®**  
SVP, Senior Wealth Advisor



**JANELLE T. SARTORIO, CTFA®**  
SVP, Senior Wealth Advisor



**FABIANA PEREIRA**  
AVP, Wealth Advisor

## Wealth Management Client Support



**KELLY M. BROWN**  
SVP, Wealth Operations Manager



**MARY OBARA**  
Client Service Associate



**ZACHARY ERWAY**  
Wealth Administration Associate



**JIM HURST, MBA, CISP**  
Wealth Management Operations Specialist

# Our Team

## Financial Advisory



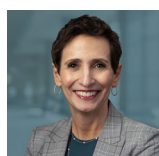
**BRANDY MOHAN, CRC®**  
Financial Advisor, Registered Representative, Osaic Institutions, Inc.



**ZACHARY MAGISTRO**  
Financial Advisor, Registered Representative, Osaic Institutions, Inc.



**JOSHUA BORDIS, CRPC®**  
Financial Advisor, Registered Representative, Osaic Institutions, Inc.



**TONI CIAMPAGLIONE, CFP®**  
SVP – NHTrust, Financial Advisor, Registered Representative, Osaic Institutions, Inc.



**DAVID J. JAMES, APMA®**  
Financial Advisor, Registered Representative, Osaic Institutions, Inc.



**FABIANA PEREIRA**  
AVP – NHTrust, Financial Advisor, Registered Representative, Osaic Institutions, Inc.

## Financial Advisory Client Support



**SARAH OWENS**  
Client Relationship Associate, Registered Representative, Osaic Institutions, Inc.



**CODY STEED**  
Client Relationship Associate, Registered Representative, Osaic Institutions, Inc.

# Board of Directors

Chair: Michael O'Leary, Holderness

Vice Chair: Jeffrey S. Kipperman, Enfield

Peter G. Bloomfield, Hollis

Kathy Collinsworth, Keene

Charles G. Hanson, Center Harbor

Cydney Shapleigh, Concord  
*(President of NHTrust)*

Gregg R. Tewksbury, Keene  
*(President & CEO of New Hampshire Mutual Bancorp)*

Christiana Thornton, Pembroke

Justin Van Etten, Holderness

