



NOVEM
GROUP

The Herendeen-Springer Team

Full Service Wealth & Group Retirement Plan Management

How we can help you

As a team, we specialize in serving both high-net-worth individuals and organizations seeking comprehensive group retirement plan solutions. From navigating the complexities of wealth management to designing and overseeing sophisticated retirement plans, we provide deeply personalized service. Our clients benefit from our team's seamless coordination, technical excellence, and unwavering focus on protecting and growing their financial futures.

What makes us knowledgeable

With nearly 25 years of experience, Charles leads the team with deep expertise in investment management and retirement plan consulting, backed by multiple advanced industry designations and national recognition from the Financial Times. Mackenzi brings a modern, client-centric approach to both individual and group retirement planning. A CFP® and AIF® designee, she combines strong technical skills with a sharp eye for detail. Together, we offer a sophisticated, team-based advisory experience—balancing long-term insight with fresh perspective to meet the evolving needs of high-value clients and plan sponsors.

Getting to know us

We genuinely enjoy the work we do and the people we work with. Charles is a steady, trusted advisor with a strong sense of community—whether its golf, playing guitar, mentoring young athletes through Victor Boys Youth Lacrosse, or guiding clients through important financial decisions. Mackenzi brings warmth, energy, and a personal touch to every client interaction. Outside the office, she finds joy in fitness, good food, and summer days on the Finger Lakes. Together, we build lasting relationships rooted in trust, empathy, and a shared commitment to helping our clients thrive.



Charles G. Herendeen

CRSP®, GBA®, AIF®

cherendeen@novemgroup.com

(585) 348-9549

Mackenzi Springer

CFP®, AIF®

mspringer@novemgroup.com

(585) 348-9555

Rochester, New York HQ

350 Linden Oaks, Ste 140

Rochester, NY 14625

(585) 348-9525

Jupiter, Florida Office

601 Heritage Drive, Ste 225

Jupiter, FL 33458

(561) 623-5492

Securities and investment advisory services offered through **Osaic Wealth, Inc.** member FINRA/SIPC. Additional advisory services offered through **Novem Group**, an SEC-Registered Investment Adviser firm. **Osaic Wealth** is separately owned and other entities and/or marketing names, products, or services referenced here are independent of **Osaic Wealth**.