

NEWS

For immediate release

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E Q U I T A

FINANCIAL NETWORK

Equita Financial Network Adds New Member and “Inspiring Insights” Webinar Sessions

Firm serving LGBTQ+ professionals adds diversity; Webinars include AI, retirement income planning, venture capitalism, and emergency continuity

FORT WASHINGTON, PA (June 27, 2023) – [Equita Financial Network](#) (Equita), a privately-held entity that offers a proven business platform for women-led, independently owned and operated fee-only financial planning firms, today announced that [Modern Family Finance](#), led by Lisa and Jennifer Dazols, has joined as a new member firm, bringing the number of member firms to seven. The network has also announced new speakers, topics, and dates for the *Inspiring Insights* educational webinar series. The series, which began in April, happens on the last Wednesday of each month at 4:00 p.m. Eastern Time (ET) and is dedicated to furthering the education and knowledge of fiduciary financial advisors.

UPCOMING EDUCATIONAL WEBINARS FOR PRESS AND FINANCIAL ADVISORS

The June webinar, [ChatGPT and other AI Tools: Overhyped or Worth a Try? How and When to Use](#), will be a panel discussion featuring [Marie Swift, CEO, Impact Communications, Inc.](#), [Charlie Van Derven, President, Social-Advisors](#), and [Suleman Din, Editor, Action! Magazine](#). The session will take place on Wednesday, June 28, 2023 at 4:00 p.m. ET. The panel will discuss the pros and cons of financial advisors using artificial intelligence (AI) in their marketing and client communications. With the rise of the use of AI, it is important that financial service professionals understand when and how to use the technology.

In July, the guest speaker is [Justin Fitzpatrick, PhD, CFA, CFP®, Co-Founder and CIO at Income Lab](#), a software company that provides financial advisors with software for ongoing retirement income management and client engagement. [Understanding Client Experiences with Spending Adjustments in Retirement](#), slated to happen Wednesday, July 26, 2023, at 4:00 p.m. ET, will discuss how adjustment-based retirement income planning differs from accumulation planning and examine how this shift affects investor psychology and client experience.

The August event will feature Equita member [Stefanie Crowe, MBA, CFP® founder and CEO of AegleWealth](#). In 2013, Crowe and six other women business leaders started [The JumpFund](#), a women-led micro venture capital firm investing in female-led ventures across the Southeast. Crowe will speak about her work with The JumpFund and how it complements her commitments as she serves her own clients. [Women Investing in Women: Gender-Lens Investing and How it Serves the Greater Good](#) is scheduled for Wednesday, August 23, 2023 at 4p.m. ET.

September brings the wisdom of Equita's co-founders [Katie Burke, CFP®](#) and [Bridget Venus Grimes, CFP®](#) as they present [Emergency Continuity Planning: Protecting Your Business and Your Clients](#). While the emphasis in the industry has been on advisor succession, Burke and Grimes emphasize that continuity planning is crucial – and an important fiduciary duty to clients. They will share their journey of protecting their businesses from disruptive “what if” scenarios and how advisors can also be prepared on Wednesday, September 27, 2023 at 4 p.m. ET.

Webinars are free to Equita members and open to any interested advisor for a \$39 fee. Free guest passes are available for the May session: inquire by emailing DoriThomas@ImpactCommunications.org.

Members of the press are invited to sit in on any of the sessions above. For a press pass, email DoriThomas@ImpactCommunications.org.

NEW MEMBER FIRM ADDING IMPORTANT NICHE

[Lisa Dazols, LCSW](#) and [Jennifer Dazols, CFP®](#), founders of Modern Family Finance, a full-service investment advisory firm, has joined Equita as the newest member firm. The firm integrates financial planning, investment management and coaching for women and LGBTQ+ households.

“To do mission-driven work, you need a tribe. We are excited to join this community of successful women-led financial planning firms,” stated Jennifer Dazols, Head of Client Experience for their firm. “With Equita, our clients will benefit from the shared resources and teamwork. We can now offer the intimacy of the small firm experience with the benefit of large firm resources.”

As Asian-Americans and members of the LGBTQ+ community, the Dazols hope to bring their unique perspective and more diversity to Equita. The philosophy at Modern Family Finance is to first tackle money beliefs and then to address the confidence gap when it comes to investing.

The duo, who traveled to 15 countries to interview LGBT leaders around the world, created a documentary film, [Out & Around](#). Their TED Talk, [This is What LGBT Life is Like Around the World](#), has been viewed over 3 million times.

ABOUT EQUITA FINANCIAL NETWORK

Equita Financial Network (Equita) provides a signature platform that includes all the necessary resources to run a comprehensive financial planning and investment management firm. In addition to providing proven resources, Equita also provides a powerful community of support for women-led, independently operated, fee-only financial planning firms.

Equita is an SEC Registered Investment Advisor (RIA) that allows Member firms to conduct business as a DBA, thereby avoiding the need for Member firms to register either with the State

or SEC. Equita does not take an equity stake in any Member firm. Member firms maintain their own independent, autonomous brand. Members own their client relationships - always.

The Equita platform is intentionally priced so that women business owners can keep more of what they make. Equita provides a robust and structured network component to support collaboration across Members firms, sharing of best practices, and client solutions + advocacy, education, and succession planning options. In-person and virtual gatherings support the exchange of information and ideas between like-minded professionals who share freely and support one another. Having an abundance mentality is an essential element of success when a woman becomes a part of the Equita community.

Equita also provides the opportunity to uncover potential partners for emergency continuity planning and/or succession planning purposes. Member firms are CERTIFIED FINANCIAL PLANNER™ Professionals or will commit to earning the designation.

The brainchild of co-founders Katie Burke and Bridget Venus Grimes, Equita is celebrating its fifth anniversary in May 2023. Created in 2018 by these two tenured CFPs, Equita's structure and benefits are based on their own experiences, working every day in the trenches as RIA business owners themselves.

To learn more about Equita's powerful community and proven resources, visit: www.EquitaFN.com.

***Important Disclosures:** Investment advisory services offered through Equita Financial Network, Inc. an Investment Adviser with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. Equita Financial Network also markets investment advisory services under the name, Modern Family Finance, LLC and AegleWealth.

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