NEWS

For immediate release

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EQUITA
FINANCIAL NETWORK

Equita Financial Network Announces 2025 Educational Webinar Series for Financial Advisors

Professional Insights and Growth Strategies with CEUs Available

Fort Washington, PA (March 11, 2025) – Equita Financial Network, a membership-based platform dedicated to supporting women-led fee-only financial planning firms, is pleased to announce its 2025 Inspiring Insights webinar series. This four-part series is designed to provide financial advisors with cutting-edge insights and practical strategies to enhance their firms' growth and impact. Carefully selected instructors will share actionable advice on key practice management topics such as leveraging IRS data to better serve clients, integrating philanthropy and multi-generational planning into the advisor's service mix, and mergers and acquisitions.

The series was launched in April 2023 with a mission to further the education and knowledge of fiduciary financial advisors. Many of the webinars are approved for continuing education (CE) with the CFP® Board and for NAPFA members.

The Inspiring Insights webinars are free to Equita members and open to any interested advisor for $39 fee.

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

"We are committed to equipping female financial advisors with the knowledge and tools they need to build thriving independent firms," said Katie Burke, co-founder of Equita Financial Network. "This webinar series – which is open to all who are interested, regardless of gender, member or non-member – is an opportunity for advisors to gain valuable insights from industry leaders and apply those insights directly to their practices."

THE 2025 INSPIRING INSIGHTS WEBINAR SERIES

5 Ways to Leverage IRS Data to Drive Organic Growth

- **Date:** Wednesday, March 12, 2025
- **Time:** 4:00 p.m. ET
- **Presenter:** Kevin Knull, CFP®, CEO of TaxStatus

In this educational session, Kevin Knull, CFP®, will present innovative strategies for financial advisors to achieve organic growth using IRS data. The webinar will focus on actionable techniques designed to deliver measurable results within a short timeframe. Knull will address key aspects of financial planning and practice management.

This webinar is approved for CFP® and NAPFA CE when attending the live event.

Find out more and register here.

Integrating Philanthropy into Your Financial Advisory Firm: Strategies for Growth and Impact

- **Date:** Wednesday, June 18, 2025
- **Time:** 4:00 p.m. ET
- **Presenter:** Derrick Kinney, Client Conversation Expert, Success for Advisors

This webinar explores integrating philanthropic strategies into financial advisory practices, focusing on how advisors can leverage charitable giving to enhance client relationships, attract high-net-worth prospects, and drive business growth. Attendees will gain insights into aligning financial planning with meaningful causes while adhering to fiduciary responsibilities.

This webinar is pending CFP® CE approval.

Find out more and register here.

Thriving Through M&A: The Human Side of Change

- **Date:** Wednesday, September 17, 2025
- **Time:** 4:00 p.m. ET
- **Presenters:** Amy DeTolla, Founder and CEO, Aureus Advantage, and Emily Blue, CFA, Co-Founder, Hue Partners

The wealth management industry is undergoing rapid consolidation, and M&A events are reshaping firms, careers, and client relationships. But behind the deal terms and financials are a deeper challenge — the human impact of change. Join Amy DeTolla and Emily Blue, CFA, for a powerful discussion on how women can navigate the uncertainty of M&A, manage the emotional impact, and emerge stronger in their careers. From understanding firm culture shifts to protecting client relationships and positioning the advisor for leadership, this session will equip attendees with the strategies and mindset to turn disruption into opportunity.

This webinar is pending CFP® CE approval.

Find out more and register here.

Mission-Driven Multi-Generational Planning and Investing

- **Date:** Wednesday, December 17, 2025
- **Time:** 4:00 p.m. ET
- **Presenter:** Jeffery Coyle, Founder and CEO, Libretto

True legacy planning starts with a clear purpose for wealth, incorporating a family mission that guides strategy, investments, and financial planning across generations. Jeff Coyle will present a framework for engaging households in strategic planning, organizing capital, empowering the next generation, and managing liquidity complexities while staying true to the client's mission. The session will provide a practical process for developing family mission statements that connect long-term strategy with real-life financial needs.

This webinar is pending CFP® CE approval.

Find out more and register here.

ABOUT EQUITA FINANCIAL NETWORK

Equita Financial Network (Equita) provides a signature platform with the necessary resources to run a comprehensive financial planning and investment management firm. In addition to providing proven resources, Equita provides a powerful community of support for women-led, independently operated, fee-only financial planning firms. Equita is an SEC Registered Investment Adviser (RIA) that allows member firms to conduct business as a DBA, thereby avoiding the need for member firms to register 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 member 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 CFP® marks of distinction. The brainchild of co-founders Katie Burke and Bridget Venus Grimes, Equita celebrated its sixth anniversary in May 2024. Created in 2018 by these two tenured CFP®s, Equita's structure and benefits are based on their own experiences working every day in the trenches as financial advisor 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.

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