

NEWS

For immediate release

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E Q U I T A

FINANCIAL NETWORK

Equita Financial Network Co-Founders Named Industry Transformer Finalists by Women in Wealth Management Awards

Industry event happening this week at Excell Represent recognizes pair as network celebrates 5th Anniversary

FORT WASHINGTON, PA (November 14, 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 co-founders [Bridget Venus Grimes](#) and [Katie Burke](#) have been named finalists in the Industry Transformer category by the Women in Wealth Management Awards. The award, being handed out this week at [Excell Represent](#), honors women who are driving transformation and innovation in wealth management through programs, products, or services they've created or led. Burke and Grimes are being recognized for their creation of Equita and the network's growth and impact on women financial professionals.

NEW AND ENHANCED STRUCTURE AND BENEFITS

Equita recently celebrated its five-year anniversary by announcing a new structure and enhanced benefits for their member firms, plus an online community membership open to women in the financial services industry. The revamped signature platform includes a comprehensive suite of technology, billing, insurance, and compliance solutions, access to DFA investment and practice management solutions, and a robust network and support component, including a private online community for members to share ideas and information in a safe and structured environment. The members-only community is the foundation of support for women in the network and can be purchased separately without committing to the full signature platform.

In April, the network launched the "[Inspiring Insights Webinar Series](#)," designed to elevate the knowledge and expertise of the members and other fiduciary financial advisors. The series has covered such topics as gender-lens investing, retirement planning, using AI tools, and best practices for protecting firms and clients from fraud.

[See the full Finalists announcement here.](#)

ABOUT EQUITA FINANCIAL NETWORK

Equita is an SEC Registered Investment Advisor (RIA) that allows Member firms to conduct business as a DBA. 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. To learn more about Equita's powerful community and proven resources, visit www.EquitaFN.com.

***Important Disclosures:** Investment advisory services are 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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