

# NEWS

For immediate release

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# E Q U I T A

FINANCIAL NETWORK

## Equita Financial Network Launches “Inspiring Insights” Series for Financial Advisors

*Cybersecurity, using AI to create content, and practice management/business building topics slated for 2023*

**FORT WASHINGTON, PA (May 11, 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 the launch of an educational webinar series titled *Inspiring Insights*. The series kicked off in April with an expert-led session on cybersecurity and fraud prevention for financial advisors. The series will happen on the last Wednesday of each month at 4:00 p.m. Eastern Time (ET) and is dedicated to furthering the education and knowledge for fiduciary financial advisors.

“Best Practices for Protecting Firms from Fraud”, the series’ inaugural webinar, which took place on April 24, 2023, was presented by [Chad Ramberg, President of Box Professional Insurance](#). Ramberg discussed cybersecurity and current threats that could affect financial advisors, their firms, and their clients. He shared the latest social engineering scams and trends in cyber fraud, risk management best practices to protect an advisory firm, and how cyber responsibility strengthens client relationships.

The May webinar, titled “How One Financial Advisor Grew AUM from \$0 to \$100M in less than 5 Years: A Proven Playbook for Creating a Profitable Business and a Happy Life” happening Wednesday, May 24, 2023 at 4:00 p.m. ET, features Mindy McCubbin, CFP®, ChFC, Founder of Truman Wealth Advisors. McCubbin will be accompanied by Katie Burke, CFP®, co-founder of Equita Financial Network and founder of Method Financial Planning. The two will share business building ideas, along with the resources, technology and community support strategies they have used to create a more efficient and effective firms.

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](#) on Wednesday, June 28, 2023 at 4:00 p.m. 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.

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](mailto:DoriThomas@ImpactCommunications.org)).

[To find out more and register click here.](#)

## 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](http://www.EquitaFN.com).

**\*Important Disclosures:** Registration does not imply a certain level of skill or training. Members pay to Equita an annual fee of 20 basis points, paid quarterly based on the value of all client accounts custodied at TD Ameritrade and Charles Schwab as of the last business day of the prior quarter ("AUM Fee").

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