NEWS

For immediate release

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EQUITA
FINANCIAL NETWORK

Equita Financial Network Welcomes Three New Firms to their Signature Platform

Mountain Wealth Planning, Equila Financial, and Your Story Financial educate and advise women, the LGBTQIA+ community, small business owners, and STEM professionals

FORT WASHINGTON, PA (August 12, 2024) — 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 three new member firms have joined its signature platform bringing the number of signature firms to ten. Mountain Wealth Planning, led by Amy Hamasaki, CFP®; Equila Financial, led by Ann J. Shubert, CFP®; and Your Story Financial, led by Shehara Wooten, CFP®, have all been added to the Equita community in recent months.

WOMEN-LED FIRMS SERVING THE UNDERSERVED

All three firms are full-service fiduciary financial advisory firms. Mountain Wealth Planning was established in 2020; Equila Financial launched just a few months ago, and Your Story Financial took root in 2016. All integrate financial planning, investment management, and coaching for small business owners, professional women, STEM professionals, and the LGBTQIA+ community.

Groups with unique needs and backgrounds or who have faced societal inequities have often been left out of financial services as the challenges and perspectives can be difficult to navigate. A 2023 study from the Certified Financial Planners Board found that about half of surveyed CFPs said they were not prepared to effectively assist LGBTQIA+ people with their needs, including estate planning and domestic partnerships.

"This great momentum for Equita reflects a positive trend in the industry, and increases the professional support available to those who have historically been underserved by traditional financial services firms," said Bridget Venus Grimes, CFP®, co-founder of Equita. "Equita is thrilled to support the growth of these women-led firms. We have watched other women financial advisors on our platform do just this, and their success has been remarkable."

Amy Hamasaki, CFP®
Mountain Wealth Planning

Ann Shubert, CFP®
Equila Financial

Shehara Wooten, CFP®
Your Story Financial

Shubert and Wooten come from a STEM background while Hamasaki is well versed in tax strategy. All three enjoy serving women in transition and anyone navigating pre-retirement and retirement.

"My Equita membership gives me access to a wonderfully supportive group of independent, financial planning-focused women advisors to learn from and bounce ideas off of while I still can structure my business the way I choose," stated Shubert. "It's the best of both independence and community!"

Shubert, who has an undergraduate degree in Physics from Princeton University and a Masters in Astrophysics from Caltech, had a 30-year career in the defense industry when she decided to shift gears. Becoming a financial advisor gave her the opportunity to combine her long-term interest in investing with her extensive experience in planning and risk management to help people improve their financial lives.

"I joined Equita Financial Network to gain significantly more back-office support," stated Wooten. "I'm excited to focus on the work that I enjoy and, that is, helping my clients craft their amazing financial success story."

Wooten, who has a B.S. in electrical and computer engineering from The Ohio State University, began her advisory career in 2004 as a Variable Annuities internal wholesaler and in 2009 she became a financial advisor in a role that limited who she could serve, excluding individuals who didn't meet certain high asset criteria. Branching out on her own in 2016 to become a fee-only fiduciary financial planner was the best option for her to help women and her former STEM colleagues gain access to robust financial planning without any barriers.

"I joined Equita to collaborate and synergize with other like-minded women who are passionate about helping people achieve great financial outcomes, and I have not been disappointed," stated Hamasaki. The ability to meet on a regular basis about how to better serve our clients and grow our practices has been an incredible experience, and I very much look forward to the future with this amazing partnership!"

Hamasaki has over 20 years of experience working with individuals and businesses to create effective financial plans. She gained insights while working at a larger national wealth management firm. She has extensive tax experience as a former Enrolled Agent with the IRS and in controlling a real estate holding company for nearly ten years.

All three firms meet with clients virtually. Shubert from her Albuquerque, NM office; Wooten from her office in the Dayton, Ohio area; and Hamasaki who resides near Colorado's Winter Park ski resort.

To find out more about each firm and their founders, visit: www.YourStoryFinancial.com, www.EquilaFinancial.com, and www.MountainWealthPlanning.com.

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 celebrated its sixth anniversary in May 2024. 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.

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