



Honoring Advisors Women can Trust



Women value financial security but struggle knowing where to start and who they can trust with their finances. We recognize financial advisors who are committed to the women’s market and serving female clients and who qualify based on 17 criteria making it easier to choose with confidence. We applaud the advisors below for their dedication to educating and helping women make the right financial decisions.

ARIZONA



Phoenix, AZ

Versant Capital Management

“Financial independence isn’t just about how much money you have. It’s also about having the confidence to make your own decisions. I help women manage their wealth through all of life’s transitions.”
Liz Shabaker, CFP®, CDC®
Chief Executive Officer



Scottsdale, AZ

KDI Wealth Management

“I am pleased to have been named to this prestigious list—a recognition that, to us, speaks to our firm’s commitment to excellence. I am grateful for the trust our clients place in us, and we remain committed to providing the guidance and support they need to achieve their unique financial goals.”
Kevin Dick, AIF®, AAMS®, CRPS®, CPFA®
President & Wealth Advisor

CALIFORNIA



San Francisco, CA

Minkoff Wealth Partners

“It’s simple: when women feel confident about their financial futures, their families benefit. I feel incredibly lucky that my career allows me to help women and their families achieve peace of mind and a more financially secure future.”
Courtney Horn, APMA



Newport Beach, CA

Lockerman Financial Group, Inc

“It is an honor to receive this award. We are grateful to our client family. Our mission is to make their lives, and the lives of future generations, better for having chosen our firm as their financial partner.”
Lisa L. Lockerman, MSFS, ChFC, AEP, BFA™



Walnut Creek, CA

Nurtured Wealth, LLC

“I love that every day I have the opportunity to help empower women and their families by establishing their financial goals, planning for what is important, protecting against life’s changes and going to bed each night feeling more secure in their financial ability.”
Jessica L. McCurdy, CFP®
Founder, Wealth Advisor

CONNECTICUT



Westport, CT

Farther Finance Advisors, LLC

“I am passionate about helping women live more fulfilling lives. My team provides the education, empowerment, and proactive support that busy women need — enabling them to spend their time on the things that matter most.”
Katherine A. Fibiger, CFP®, RICP®
SVP Wealth Advisor

FLORIDA



Plantation, FL

Tobias Financial Advisors

“Financial planning is never a ‘set it and forget it’ project; it requires constant monitoring and creativity to adjust to an ever-changing world.”
Mariana Collado
CEO & Senior Wealth Advisor



Palm Harbor, FL

SimplePath Retirement, LLC

“I am passionate about empowering and educating women and believe that living your best life starts with financial confidence. As a woman, I understand the power in creating true financial independence.”
Celine J. Pastore, CRPC®, MRFC®



Boca Raton, FL

Richman Capital Management

“Our women clients want an advocate that speaks their language, listens with empathy and understanding and guides them toward financial security.”
Craig Richman, CLU, ChFC, AIFA®, CDFA®
Private Wealth Practice for Women

GEORGIA



LaGrange, GA

True North Investments

“We are passionate about serving our clients and their families. Our goal is to be their guide through life’s transitions to achieve the financial future of their dreams.”
Summer Parmer Deal
Founder & Wealth Advisor



Jasper, GA

Swan Financial Advisors, LLC

“My mission is to equip and empower women to live financially fearless, know their true worth and be the heroes in their stories.”
Jennifer Perri, RFC, CEO

MASSACHUSETTS



Great Barrington, MA

Blue Spark Financial

“We believe in the power of smart financial planning for women at all stages of their lives. We empower women to make informed decisions, encourage them to actively plan, educate them about their options, and help make them feel comfortable with investing and their finances.”
Maura Griffin, CFP®, CEO & Founder

MINNESOTA



Edina & Blaine, MN

Confetti Wealth, a private wealth advisory practice of Ameriprise Financial Services, LLC

“We believe in the importance of staying focused on your financial goals, especially through unprecedented times. Together, we will help create more to celebrate in your financial life.”
Michelle Young, Private Wealth Advisor & President of Confetti Wealth

NEW JERSEY



Fair Lawn, NJ

Baron Financial Group, LLC

“Guiding you toward financial security through objective, transparent, and fiduciary advice.”
Victor Cannillo, NAPFA-Registered Financial Advisor, **Anthony Benante**, CFA, **Nicholas Scheibner**, CFP®



Bedminster, NJ

Main Street Wealth Management, LLC

“We strive to help our clients realize their financial dreams by assisting them in creating plans that help them live their life by “design” and not by “default.”
James E. Dy, CFP, ChFC, CIMA, AIF, AAMS, AWMA
Partner & Wealth Manager



Clinton, NJ

Michelle Heide & Associates, a financial advisory practice of Ameriprise Financial

“I’m passionate about what we do and the clients we serve. I believe success isn’t measured just by your financials, but by how confident you feel about your future.”
Michelle Heide, CFP, CRPC, BFA
Private Wealth Advisor



Marlton, NJ

Family Wealth Management

“Our mission is to simplify your financial life, protect your wealth, and give you the opportunity to enjoy life, free from the burden of financial worries.”
Martin V. Higgins, CFP®, ChFC®, CLU®, AEP®, LUTCF®, RHU®, Founder/President

NEW YORK



New York, NY

Drucker Wealth

“Our goal is to help our predominantly female clientele build their personal financial roadmap with the same degree of clarity, direction, and purpose that they’ve achieved in other areas of their life...We are proud to be part of their financial journey.”
Gideon Drucker, CFP®, AIF®, ECA
Managing Partner, Wealth Builder Division



New York, NY

Drucker Wealth

“Our goal is to help our female clients create their Financial Life Plan® (FLP). What Waze is to getting you to your destination, our “FLP” is to achieving your financial & life goals.”
Lance Drucker, CLU®, ChFC, AIF®
President & CEO



Melville, NY

Frisch Financial Group, Inc.

“We provide women with the knowledge to make educated decisions that lead to a strong financial future.”
Joyce A. Streithorst, CFP®, MSFS, CDFA, Wealth Advisor, **David A. Frisch**, CPA, CFP®, PFS, Founder, CEO, **Jason M. Sacks**, CFP®, Shareholder, Wealth Advisor, **Shawn P. Gallagher**, CFP®, CRPC, Wealth Advisor



Rochester, NY

OakWood Financial Services

“We enjoy helping clients find financial independence by understanding their needs and assisting them in identifying opportunities in the ever-changing landscape of taxes and investment options.”
Mike McNaughton, CFP®, CLU®, CLTC, AIF®
CEO & Founder



Rochester, NY

OakWood Financial Services

“I believe communicating financial concepts and industry terminology in a way that is understandable empowers clients to feel confident and be fully engaged in the planning and investment process.”
Dan Schmitz, CFP®, AIF®, CLTC
President & Founder

VIRGINIA



Reston, VA

VISTA Wealth Strategies LLC

“Our clients’ peace of mind comes from knowing that we always have their best interests at heart. We simplify the complexities of their important financial and life decisions so they feel confident about their future.”
Judy Redpath, CFP®, AIF®

WISCONSIN



Hales Corners, WI

Wilke Wealth & Investment Planning

“We collaborate with physicians and business owners through financial planning to educate them on their family’s financial future.”
Melinda Wilke, CFP®, WMCP®, RICP®, ChFC®, CLU®, CASL®, CLF®
Founder/Wealth Management Advisor

It’s Financial Planning Month!

Are you on track to meet your financial goals?

Visit WomensChoiceAward.com/financial-advisors for a full list of trusted Financial Advisors or to see if you qualify.

Financial advisors who meet the strict criteria set forth by WomenCertified Inc. can earn the Women’s Choice Award®. Financial advisors do not pay a fee to be recognized as a Women’s Choice Award Financial Advisor. WomenCertified Inc. receives a licensing fee from businesses that enter into a Partnership with WomenCertified Inc. The inclusion of a financial advisor within the Women’s Choice Award Financial Advisor network should not be construed as an endorsement of the financial advisor by WomenCertified Inc. or its partners and affiliates and is no guarantee as to the future investment success.



Breast Cancer Awareness Month
Know where to go, it can save your life!
womenschoiceaward.com/mammogram

