

# Honoring Advisors Women can Trust



Women value financial security but struggle knowing where to start and who they can trust with their finances. We do the homework for you and recognize financial advisors who qualify based on 17 criteria making it easier for you to choose with confidence. We applaud the advisors below for their dedication to educating and helping women make the right financial decisions.

## ARIZONA Versant Capital Management



Phoenix, AZ  
& Dallas, TX

"As women grow wealth, we must adapt to serve their evolving needs. Cultivating change empowers women to maximize financial influence and navigate societal challenges to lead life on their terms."

**Liz Shabaker, CFP®, CDC®**  
Co-CEO

## GEORGIA SHERO Coaching & Consulting



Jasper, GA

"Embrace your worth, ladies. Financial freedom isn't just about wealth; it's about choice, power, and crafting a life by design. Own your money, own your future."

**Jennifer Perri, RFC, CEO**  
Master Money & Mindset Coach  
CDC Certified Divorce Coach®

## NEW JERSEY Family Wealth Management



Marlton, NJ

"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**

## ARIZONA KDI Wealth Management



Scottsdale, AZ

"At KDI Wealth Management, we believe peer to peer advising should make your wealth feel effortless."

**Kevin Dick, AIF®, AAMS®, CRPS®, CPA®, CFP®, CEO & Wealth Advisor**

## MARYLAND FinanceForward, LLC



Annapolis, MD

"Helping women achieve financial success is part of my mission. I thoughtfully work with clients to provide clarity, vision, purpose and simple action steps towards financial peace."

**Elaine Shanley, CFP®, AIF, CDFIA Partner**

## NEW YORK Drucker Wealth



New York, NY

"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 President, Drucker Wealth**

## NEW YORK Drucker Wealth



New York, NY

"I aim to help women on their financial journey & am in tune to the unique challenges faced with juggling family, career & finances. My team provides experienced guidance & empathy for women at any stage in their financial life. Together with personalized strategies, we help pave the way for a secure & confident future."

**Autumn Lax, CFP®, AIF®**  
Lead Financial Planner

## CALIFORNIA Lockerman Financial Group, Inc



Newport Beach, CA

"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, MSF, ChFC, AEP, BFA™**

## MICHIGAN Darden Wealth Group & DWG



Ann Arbor, MI

"We strive to understand female investors' goals and lifestyle in order to empower them with confidence in their financial future, making it clear that our focus is on the individual."

**Andrea B Darden, AAMS, CEO**

## CALIFORNIA Nurtured Wealth, LLC



Walnut Creek, CA

"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**

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



Edina & Blaine, MN

"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 YORK Frisch Financial Group, Inc.



Melville, NY

"We empower women with the knowledge to make educated decisions that lead to a strong financial future."

**Joyce A. Streithorst, CFP®, MSFS, CFA, Wealth Advisor**  
**Jason M. Sacks, CFP®, Wealth Advisor**  
**David A. Frisch, CPA, CFP®, PFS, Founder, CEO**  
**Shawn P. Gallagher, CFP®, CRPC, Wealth Advisor**

## FLORIDA SimplePath Retirement, LLC



Palm Harbor, FL

"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®**

## NEW JERSEY Baron Financial Group, LLC



Fair Lawn, NJ  
Sarasota, FL

"Guiding you toward financial security through objective, transparent, and fiduciary advice."

**Victor Cannillo, NAPFA-Registered Financial Advisor**  
**Anthony Benante, CFA**  
**Nicholas Scheibner, CFP®**

## TEXAS Gardner Wallace Financial Solutions



Addison, TX

"At Gardner Wallace we specialize in helping women identify their financial needs. As a team our focus is to develop strategies to implement a plan that evolves with them through their unique life cycle."

**Frances Gardner, CFP®, Patrick Wallace, ChFC®, Andrew Gardner, CFP®, Robert Gardner, CEPA**

## FLORIDA Richman Capital Management



Boca Raton, FL

"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®, CDFIA®**  
Private Wealth Practice for Women

## NEW JERSEY Main Street Wealth Management, LLC



Bedminster, NJ

"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**

## WISCONSIN Wilke Wealth & Investment Planning



Franklin, WI

"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®, CASI®, CLF®**  
Founder/Wealth Management Advisor

## It's Financial Planning Month!

Are you on track to meet your financial goals?

Visit [WomensChoiceAward.com/financial-advisors](https://WomensChoiceAward.com/financial-advisors) for a full list of trusted Financial Advisors or to see if you qualify.

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## Breast Cancer Awareness Month

Know where to go, it can save your life!

[womenschoiceaward.com/best-hospitals](https://womenschoiceaward.com/best-hospitals)

