

Honoring Advisors & Firms Women can Trust



2017
WOMEN'S CHOICE AWARD®
FINANCIAL

"In today's market, trust, dedication and experience is critical when choosing the right financial advisor. We are proud to honor the financial professionals below for their dedication to helping women and their families make the right financial decisions."

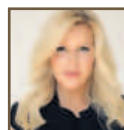
- Delia Passi, Founder of the Women's Choice Award®

CALIFORNIA



DB Wealth Management Group, LLC
"Our goal is to help women take control of their financial lives. Through our passionate commitment to a comprehensive planning approach, we partner with women in pursuit of making the best financial choices for themselves and their families."

Jeanne Bradford-Odorico, CFP, CLU, Principal
San Diego



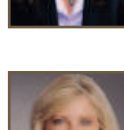
Empyrion Wealth Management Inc.
"People before profit, and Service above self."
Kimberly Foss, CFP®, CPWA® Founder and President, Roseville



Insight Financial Advisors
"Our focus is on making our clients feel safe, heard, and taken care of. Our goal is that you reach your goal, let's get there together."
Wanda Delgado, CFP®, Registered Principal, Santa Ana



Lockerman Financial Group
"It is an honor to receive this award. We are grateful for 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 - Wealth Advisor, Newport Beach



May Wealth Management Group
"Placing the client's interest first, we focus on your financial well-being. We take the time to listen, to learn about you - your situation and concerns."
Sheri L. May, CFP, President, Santa Maria



Minkoff & Associates
"When it comes to financial futures, peace of mind and empowerment go hand in hand. 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, Principal & Financial Advisor, San Francisco



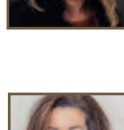
Mosaic Financial Partners
"My passion is in working with women undergoing a life transition such as a divorce, widowhood, or marriage. Together, we create empowerment by managing your present and planning for your future."
Mary Ballin, CFP®, Client Advisor, San Francisco and Walnut Creek



Nurtured Wealth
"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®, CDFA™, Founder, Wealth Advisor, Walnut Creek



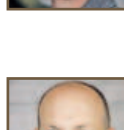
Steel Peak Wealth Management
"My passion is to inspire every woman to become more knowledgeable about investing, feel more confident about making wise financial decisions while living a meaningful life."
Millu Ramirez, Wealth Advisor, Woodland Hills



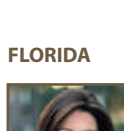
Price Financial Group
"Guiding women through life's transitions became my passion many years ago when a client asked for advice during her divorce. It is especially gratifying for our all-female firm to empower other women through comprehensive wealth management and financial education to achieve their goals and reach for their dreams."
Lori R Price, CFP President & CEO, Wilton



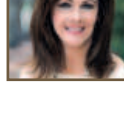
Sagemark Consulting
"Within my firm at Sagemark Consulting, we recognize that we have to earn your trust each and every day and are motivated and strive to deliver actionable advice worth far more than its cost. Our goal is simply to...serve first, last and always. (SM). I am truly honored to have received this recognition."
John R. Bonnemort II, MBA Private Wealth Advisor, Salt Lake City



Amendola Financial Group, Inc.
"The Women's Choice Award embodies the highest standards of excellence. I feel honored to be part of this tradition of empowering women. Wealthcare4Widows® supports every woman expressing her brilliant, smart, and remarkable self. Thank you so much for this recognition."
Laura L. Amendola, CFP® Founder, Wealthcare4Widows®, Port Charlotte



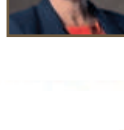
Richman Capital Management
"We create an environment where women are understood, their true concerns are addressed as they start their new path toward financial abundance and happiness."
Craig Richman, CLU, ChFC, AIFA®, CDFA™, Advisor for Women in Transition, Boca Raton



United Capital
"My life purpose is to be an advocate for women and to make sure they understand money."
Cary Carbonaro, CFP, MBA, Managing Director and Author of the Money Queens Guide for Women, Clermont (FL), Huntington (NY)



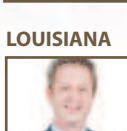
Atlanta Financial Associates
"As co-founder of Atlanta Financial, I've spent more than 25 years helping people pursue their dreams of financial security. I am especially passionate about empowering women financially, and focus on helping women in transition due to loss of a spouse through divorce or death."
Cathy C. Miller, Principal, M.B.A., CFP®, CRPS® and CDFA™, Atlanta



ILLINOIS



DeRose Financial Planning Group
"For over twenty one years, my firm has been committed to providing clients with holistic view of their finances to plan for their future. I am honored to receive this recognition."
Karen L. DeRose, President, Chicago



Gregory Ricks & Associates
"I strive every day to ensure that my clients' investments are doing the right jobs for the right period of time so that they can reach their desired financial destination."
Gregory Ricks, Founder & CEO, Metairie



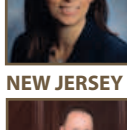
Robert L. Stern Financial Services
"In a world of hyper speed one thing endures, our dynamic relationship with you, our clients—a relationship grounded in experience, the highest ethical standards and ongoing commitment to world class service."
Robert L. Stern, ChFC, CASL
Nicholas E. Stern, CFP®, Amherst



Northstar Financial Planning
"Guiding women to prosperity by focusing on both their wealth and well-being. Helping them gain clarity and confidence as they navigate life's many changes."
Robin Young, CFP®, RLP®, CeFT® President, Windham



Family Wealth Management
"Be clear about who the client is - you or your statements."
Martin V. Higgins, CEO & Founder of Family Wealth Management, Marlton



Main Street Wealth Management, LLC
"We are committed to helping clients realize their financial dreams, by assisting them in creating plans that help them live their lives by 'design', and not by 'default'.
James E. Dy, CFP, CIMA, AIF, AAMS, AWMA - Wealth Manager & Partner, Bedminster



Taylor Financial Group
"Empowering women on their journey towards financial security." Securities offered through Cetera Advisor Networks LLC, Member FINRA/SIPC. Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Cetera Advisor Networks LLC is under separate ownership from any other named entity.
Debra Taylor CPA/PFS, JD, Wealth Manager, Franklin Lakes



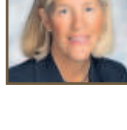
The Falcon Financial Group
"I provide comprehensive financial planning and wealth management for individuals and small businesses. I help them understand their financial future and empower them to make choices to realize their goals."
Jody D'Agostini, CFP®, CDFA™, Senior Partner, Morristown



Drucker Wealth Management
"Our primary mission is to educate women to empower you to make smart financial choices. Especially during periods of transitions in your life, we want to give you the courage & knowledge to make positive steps for your financial future."
Lance Drucker, ChFC, CLU; CEO & President of Drucker Wealth Management, New York



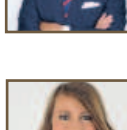
Frisch Financial Group, Inc
"We are thrilled to receive this honor. Working with women to better understand their finances and be empowered to make smart, educated decisions is our goal."
Joyce A. Streithorst, CFP®, MSFS, CDFA, Director of Financial Planning and Chief Compliance Officer
David A. Frisch, CPA, CFP®, PFS, President and Founder
Jason M. Sacks, CFP®, CFS, Partner and Director of Investment, Melville



Dougherty & Associates
"Our mission is to walk alongside our clients, to partner with them for life to insure that they are secure in facing the challenges and the detours that life presents to all of us."
Charlotte Dougherty, President. John Dougherty III, Partner. Andrew Tedesco, Partner, Cincinnati



von Borstel & Associates
"I help you identify a clearer pathway towards personal success by listening to learn your dreams. Then we implement a unique eight-step process that helps facilitate your success by aligning your values, vision, and wealth. Our Vision to Wealth Process."
Wayne von Borstel, President and Founder CLU®, ChFC®, CFP®, MSFS, Portland



Gardner Wallace Financial Solutions
"As a Certified Financial Planner™ professional for over 25 years, I feel honored each day to help individuals and businesses find financial solutions that fit their needs."
Frannie Gardner, CFP®, CDFA®, CFE®, Addison



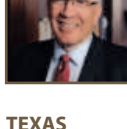
VISTA Wealth Strategies LLC
"Our clients' peace of mind comes from knowing that I always has t interest at heart. We want all of our clients to feel confident in their decision-making."
Judy L. Redpath, CFP®, AIF®, Reston



Harsin Wealth Management
"Helping women through the divorce process."
Dick Harsin, President, Lynnwood



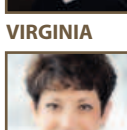
von Borstel & Associates
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Wayne von Borstel, President and Founder CLU®, ChFC®, CFP®, MSFS, Portland



Frannie Gardner, CFP®, CDFA®, CFE®, Addison



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Harsin Wealth Management
"Helping women through the divorce process."
Dick Harsin, President, Lynnwood



Awarded Advisors & Firms

CALIFORNIA

Jeanne Bradford-Odorico, **DB Wealth Management Group, LLC**, San Diego
Kimberly Foss, **Empyrion Wealth Management Inc.**, Roseville
Wanda Delgado, **Insight Financial Advisors**, Santa Ana
Lisa L. Lockerman, **Lockerman Financial Group**, Newport Beach
Sheri L. May, **May Wealth Management Group**, Santa Maria
Courtney Horn, **Minkoff & Associates**, San Francisco
Mary Ballin, **Mosaic Financial Partners**, San Francisco & Walnut Creek
Ora R Citron, **ORA CITRON**, Walnut Creek
Jessica L. McCurdy, **Nurtured Wealth**, Walnut Creek
Millu Ramirez, **Steel Peak Wealth Management**, Woodland Hills

CONNECTICUT

Laurie Stefanowicz, **Catamount Wealth Management**, Westport
Thomas O'Shea, **Claddagh, LLC**, Fairfield
Lili A. Vasileff, **Divorce And Money Matters LLC**, Greenwich
Lori R Price, **Price Financial Group**, Wilton
John R. Bonnemort II, **Sagemark Consulting**, Salt Lake City

FLORIDA

Mari B. Adam, **Adam Financial Associates, Inc.**, Boca Raton
Laura L. Amendola, **Amendola Financial Group, Inc.**, Port Charlotte
Baron Financial Group, Sarasota
Craig Richman, **Richman Capital Management**, Boca Raton
Cary Carbonaro, **United Capital**, Clermont

GEORGIA

Cathy C. Miller, **Atlanta Financial Associates**, Atlanta
Jamie K. Williams, **Five Talents Wealth Management, Inc.**, Canton

ILLINOIS

Karen L. DeRose, **DeRose Financial Planning Group**, Chicago
Gisella Tomasio, **Gisella Tomasio Financial Strategies Group**, Chicago

LOUISIANA

Gregory Ricks, **Gregory Ricks & Associates**, Metairie

MASSACHUSETTS

Nicholas E. Stern, **Robert L. Stern Financial Services**, Amherst

MARYLAND

Elaine M. Shanley, **Young & Company Wealth Management Strategies, LLC**, Annapolis

MISSOURI

Diane Sher, **Krilogy- The Sher Group**, Clayton

NEW HAMPSHIRE

Robin Youn, **Northstar Financial Planning**, Windham

NEW JERSEY

Baron Financial Group, Fair Lawn
Martin V. Higgins, **Family Wealth Management**, Marlton
James E. Dy, **Main Street Wealth Management, LLC**, Bedminster
Debra Taylor, **Taylor Financial Group**, Franklin Lakes
Jody D'Agostini, **The Falcon Financial Group**, Morristown

NEW YORK

Cary Carbonaro, **United Capital**, Clermont
Lili A. Vasileff, **Divorce And Money Matters LLC**, Greater Metro
Lance Drucker, **Drucker Wealth Management**, New York
Joyce A. Streithorst, David A. Frisch, Jason M. Sacks,
Frisch Financial Group, Inc, Melville

OHIO

Charlotte Dougherty, **Dougherty & Associates**, Cincinnati

OREGON

Julia M. Carlson, **Financial Freedom Wealth Management Group, LLC**, Newport
Wayne von Borstel, **von Borstel & Associates**, Portland

TEXAS

Patrick K. Wallace, **Armor Wealth Management**, Addison
Andrew R. Gardner, **ARMOR Financial Solutions Group**, Addison
Frannie Gardner, **Gardner Wallace Financial Solutions**, Addison
Sharon Joseph, **Joseph Financial Partners**, Fredericksburg

VIRGINIA

Judy L. Redpath, **VISTA Wealth Strategies LLC**, Reston

WASHINGTON

Dick Harsin, **Harsin Wealth Management**, Lynnwood



**Named one of America's
Fastest-Growing
Private Companies
2015-2016-2017**

For a full list of award winning Financial Advisors & Firms visit WomensChoiceAward.com

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