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Meet Award-Winning Financial Planner and Women & Wealth Expert & Author: Cary Carbonaro, CFP®[®], MBA

“Her decades of being a sherpa for women in the male-dominated financial services field serves as the backdrop for [her new] book, which is aimed at teaching her colleagues about the psychology behind women’s financial mojo and the best ways to attract and retain female clients.”

— **Kerry Hannon, Yahoo Finance**



Cary Carbonaro is an award-winning Certified Financial Planner™ professional with over 25 years of experience, and currently serves as Managing Wealth Advisor and Women and Wealth Ambassador for Ashton Thomas. She leads a multimillion-dollar financial planning practice, specializing in empowering women to overcome financial challenges and increase their financial literacy.

Cary’s extensive career includes leadership roles at ACM Wealth, Goldman Sachs where she was Vice President and Head of Office, and United Capital where she founded and led the Women’s Leadership division. At United Capital, she earned titles such as Diamond Office Winner, Managing Director, Partner, Voice of the Woman, FinLife Coach, and Most Valuable Player.

For over a decade, she has served as a CFP® Board Ambassador, representing the financial industry in the media, and has been honored six times on Investopedia’s Top 100 Financial Advisors list. In 2016, she was awarded the prestigious Investment News Women to Watch recognition. In 2024, Cary was appointed as the sole female member of the Nasdaq Advisor Council. She has also endowed a scholarship at the State University of New York at Cortland for Women in Business, where she was the founding president of Sigma Delta Tau sorority.

Cary is the founding president of the Women’s Giving Alliance, a giving circle in the South Lake Community Foundation, and a member of the Benefactors Circle at the Center for Financial Planning, where she advocates for advancing women in the financial industry. Cary’s knowledge

and expertise are highly sought after, and she frequently appears as a commentator on local and national television news channels. She has spoken around the world on financial literacy, with a focus on advocating for women and guiding them to financial empowerment.

Cary is also the author of the bestselling book *The Money Queen's Guide: For Women Who Want to Build Wealth and Banish Fear* (Morgan James, 2015) and her newest title, *Women and Wealth: A Playbook to Empower Clients and Unlock Their Fortune* (Wiley, 2025).

To learn more about Cary and her work, please visit:

carycarbonaro.com
carycarbonaro.com/speaking

To connect with Cary, visit:

www.linkedin.com/in/carycarbonarocfp
www.instagram.com/carycarbonaro
x.com/CaryCarbonaro
www.facebook.com/ccarbonaro

Notable Awards & Accolades:

- One of 15 advisors appointed to the Nasdaq Advisor Council (2024)
- Top 100 Most Influential Advisors, Investopedia (2023, 2021, 2020, 2019, 2018)
- United Capital Diamond Office Award (2019)
- Crain's Top Women in Finance (2018)
- Winner of "Women of the Decade in Finance & Leadership" Women's Economic Forum (2017)
- Investment News Women to Watch (2016)

As Seen On:



Women and Wealth: *A Playbook to Empower Clients and Unlock Their Fortune*

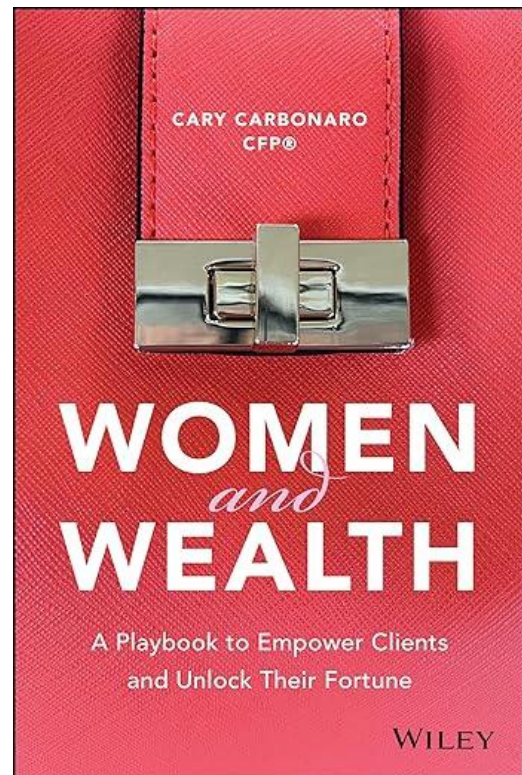
A #1 Best Seller on Amazon in Economics and Business Finance

“This is more than a business opportunity. It’s a movement. And the future belongs to those who show up for women.” — **Cary Carbonaro**

In *Women and Wealth: A Playbook to Empowering Clients and Unlocking Their Fortune* (Wiley, April 2025), award-winning author and certified financial planner Cary Carbonaro delivers a practical and insightful guide for financial services professionals who want to better serve their female clients.

The author explains the unique needs of women clients, the unique psychology driving their financial decisions, and their reasonable demands for personalized client care. She also offers actionable strategies, research-backed approaches, and real-world examples and case studies you can use to better serve women who reach out for personal finance and wealth management advice.

A unique and powerful roadmap for financial services professionals seeking to better understand and serve women, *Women and Wealth* is a must-read for financial advisors and planners, insurance agents, bank and credit union representatives, and accountants everywhere.



Praise for *Women and Wealth*:

“A playbook explaining how the wealth management industry must adapt to hire and serve more women... [Cary] challenges the industry to take the steps she outlines in order to attract more women as clients and advance their careers in the profession, like educational programs, seeking opportunities in client transitions, addressing race and gender-based disparities and altering the entire approach to the business.” — **Tobias Salinger, Financial Planning**

“Cary Carbonaro’s approach to wealth management goes beyond numbers—it’s about understanding the unique challenges women face and giving them the tools to thrive. *Women and Wealth* is an invaluable resource for advisors looking to better serve their clients, especially women, and guide them toward long-term financial success.” — **Aaron Brodt, CEO & Founder of Ashton Thomas Private Wealth**

"The historical norms of financial firms, regarding who our client is, no longer apply. "Women and Wealth" will help the successful evolution of human advice in wealth management which will require more female financial advisors & clients. Cary Carbonaro has been a leader who empowered positive change in the perception of women clients." — **Haig Ariyan, CEO, Arax Investment Partners, Chairman, Ashton Thomas Private Wealth**

"*Women and Wealth* is a timely guide that addresses one of the most critical opportunities in financial planning today: empowering women to take control of their financial futures. This book provides tools to address the unique financial challenges and opportunities women face. Cary's approach underscores the critical need for empathy, understanding and action in creating a more inclusive and impactful financial planning experience." — **Kevin R. Keller, CAE, CEO of the CFP Board**

"Women and Wealth is the ultimate playbook for financial advisors looking to better serve women. Cary Carbonaro blends compelling personal stories with decades of professional expertise to create a guide that's as inspiring as it is practical. This book is a game-changer for advisors, positioning you as the go-to expert to inspire and empower women to confidently take control of their financial futures. A must-read for advisors ready to lead the way in reshaping financial advice for women." — **Larry Sprung CFP® Author of *Financial Planning Made Personal***

"Cary Carbonaro's new book, *Women and Wealth: A Playbook To Empower Clients and Unlock Their Fortune*, labels the elephant in the room. Female clients continue to be underserved despite decades of initiatives aimed at better addressing their needs and the knowledge that this demographic represents a billion-dollar revenue opportunity. Cary offers practical insights as a woman advisor and advocate from her years in the trenches. What I love most about the book is her nuanced and inclusive approach to serving these clients and her passion for changing the industry for the better." — **Kathleen Burns Kingsbury, Founder, KBK Wealth Connection, and author, *Breaking Money Silence*®**

"Cary Carbonaro's new book, *Women and Wealth: A Playbook to Empower Clients and Unlock Their Fortune*, provides a template to help women and their financial advisors forge a healthier and sustainable financial future." — **Mary Beth Franklin, National Social Security Expert and Creator of the PBS TV show, "Social Security & You with Mary Beth Franklin"**

"Thought leader Cary Carbonaro lays it out: our industry must adapt to serve women. With historical narratives and copious supporting data, *Women and Wealth* not only defines the problem with wealth management but also provides comprehensive and methodical solutions. As promised, it is a detailed playbook for success. The future of wealth is female." — **Blair duQuesnay, Lead Advisor, Ritholtz Wealth Management**

"*Women and Wealth* is a game-changer for both financial advisors and women looking to gain control of their financial futures. Cary has masterfully crafted a resource that goes beyond theory, offering case studies, reflection prompts, and practical strategies to empower clients and elevate your advisory practice. Cary's approach is not only a roadmap for transformation but also a call to advocate for women's wealth and leadership in finance." — **Suzanne Siracuse, CEO of Suzanne Siracuse Consulting Services**

"*Women and Wealth* reshaped my perspective, offering a profound blueprint for financial empowerment and visionary planning. As a CEO in wealth management, it has ignited a deeper clarity, powerful inspiration, and an unwavering commitment to lead with purpose."

— **Marwa Zakharia, CEO Asset Book**

"*Women and Wealth* has nailed it, and this book should be required reading throughout the profession. Blind Spot Bias is rampant for both male and female advisors when it comes to working with women. This is not a cut and paste of the usual data about women and wealth, it clearly states the disconnect with practical actions steps for all levels of client engagements."

— **Susan Bradley, Founder, Sudden Money Institute**

To learn more about *Women and Wealth*, please visit:

carycarbonaro.com/women-wealth

Discussion Topics:

- Why traditional advisory models fail women and how to fix it
- The trillion dollar opportunity: How advisors can capitalize on the "great wealth transfer" that will put trillions of dollars into the hands of women
- What women really want from financial professionals (hint: it's not just performance)
- How to build trust, communicate with empathy, and create lasting client loyalty
- Understanding the specific needs of female clients at every stage — whether they're building wealth, managing life changes or navigating retirement
- How women's financial experiences differ from men's due to societal, structural, and emotional factors— and how advisors can tailor advice to women's unique concerns and goals
- Women are not a niche: Avoiding the "widows and divorcees" stereotypes of female clients and understanding the psychology of female breadwinners
- The critical need for financial plans that account for career interruptions, caregiving, and long-term security
- How behavioral finance tools can help advisors counteract biases that limit women's financial potential
- Timely financial news and trends, especially as it relates to women and wealth management

Sample Interview Questions:

- With women expected to control over \$30 trillion in wealth, how can advisors take advantage of this trillion dollar business opportunity?
- Why do you believe women need a different approach to financial planning than men?
- What can financial advisors do to better serve and retain their female clients?
- How can advisors make sure financial plans account for non-linear career paths, parental leave, or caregiving gaps?
- How does gender bias affect women financially, and how can advisors use behavioral finance tools to help their female clients build confidence?
- How can advisors help women move from short-term financial planning to long-term wealth-building?