Governing Board
&
Advisory Council

BOARD GUIDE 2026

Women's Leadership Alliance
for Financial Advisors

OUR VISION

A transformed financial advising industry in which women comprise an equitable representation at every level.

OUR MISSION

The Women's Leadership Alliance is committed to attracting, developing, and empowering women to build thriving and fulfilling financial advising careers.

WomensLeadAlliance.org

Kimberlee Bouska

Board of Directors / President

CFP®, CRPC®, CDFA®
Addison Avenue Investment Services
Investment Management Consultant
Financial Advisor, RJFS

Portland, Oregon
503-880-2563

- 20+ years as a Certified Financial Planner™ and Chartered Retirement Planning Counselor.
- Expertise in coordinating financial plans for employees at local hi-tech companies, covering retirement, tax-efficient investing, concentrated stock positions, insurance, estate planning, and college savings.
- Focus on aligning investments with clients' values, offering options in traditional, alternative, and environmental/socially responsible investments.
- Earned Certified Divorce Financial Analyst (CDFA) designation to expand industry knowledge and better support clients through life transitions.
- Recognized in Advisor Hub 100 Solo Advisors to Watch (2023) and Working Mother Magazine's Top Wealth Advisor Mom List (2018-2020).

Teri Kelley

Board of Directors / Vice-President

CFP®, CRPS®, CIMA®
Viewpoint Wealth Management Group at Morgan Stanley
Managing Director, Financial Advisor

Phoenix, Arizona
480-568-1585

- Leads the wealth planning practice at Viewpoint Group, focusing on corporate executives, entrepreneurs, and multi-generational families.
- Serves on Morgan Stanley's National Financial Advisor Advisory Council and co-founded the Morgan Stanley Arizona Women's Advisory Council, contributing to firm strategy and client services.
- Named to Forbes Best-In-State Wealth Advisors (2021-2024), Forbes Top Women Wealth Advisors (2020-2024), and Barron's Top 1200 Financial Advisors (2023).
- Completed the Certified Investment Management Analyst® program at Wharton and the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification.
- Served on various community boards and committees including Arizona Cactus Pine Girl Scout Council, Northern Arizona Healthcare Finance and Investment Committees. Currently co-chairs WLA Arizona Circle.

Ellenore Baker

Board of Directors / Treasurer

CFP®, CEPA®

Carter Financial Management

Vice President

Dallas, Texas

214-674-0767

- Experienced financial planner specializing in risk-mitigating strategies for families, CEOs, and executive women across diverse locations.
- Former floor trader at Goldman Sachs, with expertise in hedging strategies using commodities, financial futures, and options for both domestic and international clients.
- Active in women's organizations, serving as Chairperson of the Dallas Women's Foundation and Treasurer of the Raymond James Women's Leadership Alliance.
- Holds an MBA in Finance and International Business from NYU, along with a CFP Certification from Southern Methodist University and a Private Wealth Advisor Certification from Raymond James.
- Involved in community leadership roles, including serving on the Investments Committee of the Dallas Women's Foundation and as President of the Park Meadows Ladies Association.

Danielle Page

Board of Directors /Secretary

CFP®

The Page Group of Raymond James

Managing Director

Senior Vice President, Investments

Jenkintown, Pennsylvania
215-266-5539

- Over 40 years of experience in financial services, helping clients achieve their goals through personalized financial planning since 1983.
- Recognized as a 2020 “Woman of Distinction” in the Raymond James & Associates division for outstanding leadership and client service.
- Passionate about helping clients visualize and achieve their financial dreams, from funding college education to enjoying a secure retirement.
- Dedicated to creating strategic, personalized plans for clients at every life stage, with a focus on long-term goals and financial security.
- Early exposure to finance through a childhood allowance and internship at her father's financial advisory firm, which inspired her career path.

Laura Webb

Board of Directors / Advisory Council Co-Chair

CFP®
Webb Investment Services, Inc.
Retired, President, Financial Advisor

Asheville, North Carolina
828-215-2039

- Established Webb Investment Services in 1995, focusing on supporting successful individuals, especially women, in Western North Carolina.
- A CERTIFIED FINANCIAL PLANNER® with over 39 years in the financial services industry, including roles as Department Head of Asset Management for FSC Securities and the first female Vice President of Eagle Asset Management.
- Involved in local initiatives like Pisgah Legal, Riverlink, and the YMCA, and committed to causes supporting women in business and leadership.
- A passionate supporter of women's leadership through her involvement in groups like the University of North Carolina Women's Leadership Alliance and the Women's Leadership Alliance. Currently Chairs WLA's Advocacy Circle.
- Named to Forbes' Best-in-State Wealth Advisors (2022) and Top Best-in-State Women Wealth Advisors (2024), recognizing her excellence and leadership in the financial services industry.

Heather Ettinger

Board of Directors

[Luma Thrive]
Founder & CEO

Shaker Heights, Ohio
216-225-5300

- Founder and CEO of Luma Thrive, a boutique coaching and consulting firm empowering HNW and UHNW women through a holistic approach to financial wellness, life planning, and legacy building.
- Brings 35+ years as a leading wealth management advisor and industry trailblazer, redefining how women engage with wealth and values-driven impact.
- Creator of The Lumination Process™ and a sought-after transformational coach, keynote speaker, and consultant to women's organizations, financial firms, foundations, and family offices.
- Best-selling author of Lumination: Shining a Light on A Woman's Journey to Financial Wellness and co-author of two influential Women of Wealth studies; frequently featured in top financial media.
- Award-winning leader and board member, Dartmouth alumna, nonprofit advocate, and community-focused parent, committed to advancing women's leadership, equity, and impact.

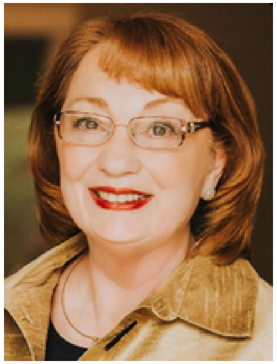
Jessica Guo

Board of Directors

[The Guo Group, UBS]
[Managing Director–Wealth Management]
[CERTIFIED FINANCIAL PLANNER®]

New York, New York
617-240-9083

- Over 25 years of wealth management experience in both Asia and US.
- Holds multiple prestigious certifications, including CERTIFIED FINANCIAL PLANNER® (CFP®), Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), and Chartered Retirement Planning Counselor™ ℠ (CRPC®), and is a member of the Investment & Wealth Institute.
- Prior to joining UBS in 2016, she was a Managing Director and Senior Portfolio Manager at Merrill Lynch, where she began her wealth management career in 2002, and previously worked as a Senior Management Consultant at KPMG Consulting.
- Member of UBS Elevate Club, which recognizes the top 1% of advisors globally, and is deeply involved in the Boston community, serving on several prominent boards and committees.
- Holds an MBA from Boston College and an undergraduate degree from Shanghai International Studies University and is fluent in Mandarin, Cantonese, and Shanghai Dialect.



Judith McGee

WLA Founder

Board of Directors

L.H.D., CFP®, ChFC
McGee Wealth Management/ Mercer Advisors
Retired, CEO and Wealth Manager

Portland, Oregon
503-329-4441

- One of the first women in the western U.S. to become a CERTIFIED FINANCIAL PLANNER™ professional in 1979, transitioning from an executive support role to a successful career in financial planning.
- Led McGee Wealth Management, a firm run by three senior women advisors, consistently named to the Top 1,000 Wealth Advisors in the U.S. list since 2016.
- Believes in the power of emotional intelligence as a resource for financial advisors, emphasizing the value of connecting with clients on a personal level.
- Advocates for attracting more women into financial planning by giving keynote speeches and writing extensively on the topic, aiming to empower women to succeed in the industry.
- Grounded in a strong work ethic from childhood, learned through hands-on experiences of earning and saving, and driven by a deep sense of responsibility for others' financial welfare.

Christine Mills

Board of Directors

CEPA, AAMS
Wells Fargo
Financial Advisor

Boca Raton, Florida
860-888-1473

- Brings over two decades of expertise in financial services, currently serving as a Financial Advisor at Wells Fargo.
- Works closely with privately held business owners and their families, helping them navigate complex succession planning with tailored financial strategies.
- Holds an MBA from Babson College, a Master’s in Education from the University of Saint Joseph, and a BS in Business Management from Florida A&M University.
- Registered Investment Advisor Representative (Series 66), Securities Representative (Series 7), and a licensed Life Variable Annuity Insurance Agent.
- Actively engaged in local volunteer initiatives and enjoys traveling, writing, and spending time with her family in Boca Raton.

Margaret Starner

WLA Founder

Board of Directors

CFP®
The Starner Group of Raymond James
Senior Vice President, Financial Advisor

Coral Gables, Florida
305-439-5226

- Established The Starner Group of Raymond James in 1981, building a successful, invitation-only wealth management practice centered on high-tech, high-touch financial planning.
- She has made the cover of Financial Advisor magazine and awarded Barron's Hall of Fame Advisor, inducted in 2019.
- Founder of the Raymond James Women's Advisory Board and the Women's Leadership Alliance.
- Inducted into the Hall of Fame (2019), and consistently named among America's Top 1,200 Financial Advisors (2009-2021).
- Cover story as a "trailblazer" in the financial planning industry in Financial Advisor Magazine.

Sherri Stephens

WLA Founder
Board of Directors

Stephens Wealth Management Group
President & CEO, Lead Wealth Advisor

Flint, Michigan
810-919-0601

- Second-generation owner, CEO, and Lead Wealth Advisor of Stephens Wealth Management Group, a Registered Investment Advisor. She began her career more than 40 years ago as an intern at the practice and became owner in 1994.
- Oversees a team who specializes in working with business owners and high net-worth families and individuals with complex, multi-faceted needs.
- Actively mentors women in finance and is a co-founder of the WLA. Sponsors a scholarship for Advancement in Wealth Management at the University of Michigan-Flint.
- Community and leadership involvement includes chair of the investment committee for the Community Foundation of Greater Flint, being on the advisory board of the business school at the University of Michigan-Flint, and board member at McLaren Flint hospital.
- Regularly honored by Forbes and Barron’s as a Top Women Advisor.

Nina Stibbs

Board of Directors

AIM Advisors, LLC
Partner, Investment Advisor

Raleigh, North Carolina
919-265-3306

- Financial advisor since 2006 with a background in institutional finance, starting on Wall Street and transitioning to Merrill Lynch and co-owning AIM Advisors in 2009 to enhance client service.
- Launched The Female Advisor Network in 2019 to foster mentorship, collaboration, and education for female financial advisors, advocating for greater representation in the industry.
- Honored with multiple accolades, including InvestmentNews 40 Under 40, Triangle Business Journal's 40 Under 40, and Investopedia's Top 100 Financial Advisors.
- Featured in major publications like Financial Planning Magazine, WSJ, and CNBC demonstrating her expertise in industry trends and financial topics.
- Contributed to the book, How I Invest My Money, where she shares how she handles her own finances and what shaped those decisions.

Tracy Alm

Emeritae Board

CFP®
Crystal Financial of Raymond James
Crystal RiverBranch Manager

Crystal River, Florida
352-322-0522

- Advisor with Raymond James since 1999 and currently serves as the Branch Manager of the Crystal River office, recognized multiple times in Raymond James Recognition Clubs, including the 2023 President’s Club.
- Advisor focus on Retirement and Longevity Planning, providing comprehensive financial planning services tailored to long-term client goals.
- Serves as President of The Rotary Club of Crystal River, board member of the Citrus County YMCA, and has participated on the Raymond James Women’s Advisory Council.
- Passionate about empowering women in financial services by sharing her own journey and helping others recognize their potential, inspired by mentors who helped shape her own path.
- Outside of work, enjoys exercising, camping, and spending time on the water in Crystal River with her husband, their children, and grandchildren.

Kalita Blessing

WLA Founder

Emeritae Board

CFP®, CAP®, AEP®, CSRIC™
Mercer Advisors
Sr. Wealth Advisor

Dallas, Texas
214-675-5050

- Over 20 years of experience, specializing in helping families manage, preserve, and grow their wealth while supporting philanthropic goals.
- Joined Quest Capital Management in 1993, became a Partner in 1999, and has served as President since 2010.
- Passionate about empowering women to understand and take control of their financial futures, especially during life transitions.
- Actively participates in various professional and civic organizations, giving back to her community through philanthropy.
- Resides in Dallas with her husband and enjoys playing tennis and traveling in her free time.

Mary Carter

WLA Founder

Emeritae Board

CFP®, ChFC®

Beachside Wealth Partners

Registered Principal Branch Manager,Financial Advisor

Jacksonville, Florida
904-866-7123

- Over 35 years of experience in the financial services industry, she is a CFP®, Chartered Financial Consultant Emeritus (ChFC), and a Registered Principal with Raymond James.
- Holds a Bachelor's degree from St. Cloud University and a Master's in Counseling Psychology from the University of North Florida, blending her education in finance and counseling to help clients navigate their financial journeys.
- Founding Director of the Women's Giving Alliance and the Honorary Director of the Unitarian Universalist Church of Jacksonville Foundation, demonstrating her commitment to philanthropy and community service.
- As President of Mary Carter Financial Services, she is deeply dedicated to solving problems and meeting goals for clients, fostering lifelong relationships that extend beyond business into genuine friendships.
- Recognized on the Forbes "Best-in-State Wealth Advisors" list in 2018.

Kathleen Miller

Emeritae Board

[CFP®, CDFA™]
[Miller Advisors, Inc. / Mercer Advisors]
Retired, President

Kirkland, Washington
425-985-0546

- A chance encounter with entrepreneur Paul Schuler led to a career shift. His mentorship and encouragement to take risks prompted her to pursue an MBA and later become a CERTIFIED FINANCIAL PLANNER™.
- Founded her own consulting business after realizing her passion for financial planning and specializing in divorce planning.
- With over 30 years of experience, she is dedicated to mentoring other women in financial planning, believing that fostering a supportive community is essential for expanding their roles in the industry.
- Started as an English and creative writing teacher, drawing inspiration from mentors who nurtured her passion for learning, which helped her develop a love for travel and independence.
- Developed a niche in the divorce planning area writing The Fair Share Divorce for Women books.

Maria Daley

Advisory Council / Co-Chair

CFP®
Perigon Wealth Management, LLC
Head of Advisor Success & Integration

Heber City, Utah
646-388-1460

- Over 30 years of experience leading business development and relationship management teams at top financial services firms, with expertise in supporting both employee and independent contractor advisors.
- Led wealth management and business development efforts, driving the firm’s growth and empowering financial advisors across the U.S. to reach their full potential.
- Focused on advancing the next generation of financial advisors, developing growth strategies, and identifying trends to enhance practice management and client financial wellness.
- Active in various professional organizations including the Women's Leadership Alliance and Vacayou Advisory Board.
- Continuously evaluates emerging technologies to optimize business practices, improve client outcomes, and foster a culture of teamwork and client-first service.

Kellie Brady

Advisory Council

UBS
Managing Director, Market Director

New York, New York
914-374-3214

- Managing Director and Market Director for the 1285 Avenue of the Americas office at UBS, where she has spent her entire 27-year career.
- She opted to pursue a career in management and advanced to several key leadership roles, including Complex Director of the Columbus, OH branch from 2006-2008.
- Since returning to New York in 2008, Kellie has played a pivotal role in strengthening UBS's leading wealth management office, making it the preferred choice for high-net-worth and ultra-high-net-worth clients.
- She holds an Executive MBA from Fordham University and a Bachelor of Science in Finance from St. John's University, and is passionate about mentoring the next generation of female entrepreneurs.
- Actively involved in several philanthropic causes, including St. Jude's Children's Research Hospital and the American Corporate Partners Mentorship Program, supporting veterans transitioning to civilian careers.

Cary Carbonaro

Advisory Council

CFP® Professional, MBA
[Aston Thomas Private Wealth](#)
[Managing Wealth Advisor](#)

Winter Garden, Florida
646-388-1460

- Certified Financial Planner™ with over 25 years of experience in wealth management and financial planning.
- Serves as Managing Wealth Advisor and Women and Wealth Ambassador at Ashton Thomas Private Wealth.
- Has authored The Money Queen's Guide and Women and Wealth: A Playbook To Empower Clients and Unlock Their Fortune.
- Named to Investopedia's Top 100 Financial Advisors list six times, highlighting her influence and excellence in the field.
- Respected media commentator and public speaker, Cary champions financial literacy and women's empowerment in wealth management globally.

Sheena Gray

Advisory Council

Association of African American Financial Advisors (QUAD-A)
Chief Executive Officer, MBA

Washington D.C.

- Leads national initiatives to expand equity, representation, and access across the financial services industry.
- With 24+ years of leadership experience, including as a licensed financial advisor, she is known for strategic leadership at the intersection of risk, policy, and industry transformation.
- Named one of Barron's "People to Watch in Wealth Management" (2025), she has driven QUAD-A's growth in partnerships, national influence, and engagement with HBCUs and emerging talent.
- She previously held senior global roles overseeing KYC, cybersecurity, regulatory risk, and inclusive leadership at major financial institutions.
- A trusted policy advocate, she collaborates with Congressional leaders and federal agencies; she holds an MBA from DePaul University and is a recognized voice on leadership, governance, and inclusive growth

Tricia Kasner

Advisory Council

Barron’s
Director, Marketing and Conferences, Retired

Brooklyn, New York
917-589-0017

- Starting her career in the Circulation Department of a Gannett-owned newspaper, she became the second woman to hold a Director's position across 93 newspapers.
- She managed three properties while focusing on improving the representation of women in leadership roles, actively recruiting, promoting, and training women to take on senior positions.
- As a senior executive in another newspaper chain, she was the only woman in a leadership role and continued her mission to promote women in the Circulation Department.
- At Barron's Magazine, she played a key role in creating Barron's Summits and later founded the Barron's Advisor Women's Summit, which has become a premier event in the wealth management industry.
- After retiring in 2019, she became Chair of the Advisory Board for the Women's Leadership Alliance, and in 2024, she joined the New York Partnership School program, where she works to support and mentor students from low-income communities.

Hannah Moore

Advisory Council

CFP®
Guiding Wealth & Amplified Planning
Founder, CEO

Dallas, Texas
214-810-3835

- Founder of Guiding Wealth (a Texas-based RIA firm) and Amplified Planning, which focuses on training future financial planners.
- Creator and host of The Externship, an 8-week virtual program offering real-world exposure to financial planning careers.
- The program serves students, career changers, and professionals exploring paths within the industry.
- Recognized as an industry leader and innovator, earning multiple awards from 2021–2025.
- Her mission is to transform financial planning education and training, reshaping how the next generation of planners is developed.

Hollis Montgomery

Advisory Council

CFP®, CPM®
Morgan Stanley
Managing Director, Wealth Management Advisor, Corporate Cash Investment Director, Senior Portfolio Management Director, Family Wealth Director

Atlanta, Georgia
404-266-6031

- Grew up in a family immersed in Wealth Management, graduated summa cum laude from the University of Georgia with a degree in Finance, gaining early experience through internships at Morgan Stanley.
- Uses a consultative process to tailor investment strategies, starting with a thorough understanding of clients' finances and future goals to identify overlooked opportunities and optimize financial plans.
- Earned her CFP® and Certified Portfolio Manager™ designations and excelled in the Financial Advisor Associate program at Morgan Stanley, achieving 1st Tier status.
- As a Corporate Cash Investment Director, she provides expertise to both institutional clients and ultra-high net worth individuals, strengthened by her role at The Peachtree Group since 2019.
- Her services include Financial Planning, Estate Planning Strategies, and Trust Accounts.

Geri Eisenman Pell

Advisory Council

CFP®, MBA, CDFA®

Rise Private Wealth Management, a private wealth advisory practice of Ameriprise Financial Services, LLC

Private Wealth Advisor, Co-Founder

Rye Brook, New York

914-269-6732

- Joined Ameriprise as an advisor in 1986 and founded Pell Wealth Partners, which recently merged with Rise Private Wealth Management, a private wealth advisory practice of Ameriprise Financial Services, LLC
- Professional rankings include: Barron’s Top 100 Women Financial Advisors (2009-2024), Barron’s Top Independent Advisors (2020, 2023-2024), Barron’s Top 1,200 Financial Advisors (2014-2017, 2019-2024),Barron’s Hall of Fame (2019), Forbes Top Women Wealth Advisors (2021-2024)
- Focuses on helping high net-worth clients plan their financial goals with the belief that financial planning should be a healing modality, reestablishing and finding peace in one’s relationship with wealth
- Has appeared on CNBC, CNN, NBC Nightly News and Fox Business news, and has been featured in publications such as The Wall Street Journal, The New York Times, and USA Today.

Jodi Perry

Advisory Council

[Raymond James Financial, Inc.]
National Head of Advisor Recruiting

St Petersburg, Florida
727-567-2588

- National Head of Advisor Recruiting at Raymond James Financial, overseeing lead recruiting across all business units.
- Previously served as President of the Independent Contractor Division of Raymond James Financial Services for over five years.
- With 31 years at Raymond James, she has held various leadership roles, including Regional Director for the Southeast and positions in the Asset Management Group.
- Earned a business degree from Eckerd College and holds the Worldwide Association of Business Coaches designation, along with Series 7, 65, and 24 licenses.
- Graduate of the Wharton Securities Industry Institute and serves on the board of the St. Petersburg Free Clinic.

Liz Weikes

Advisory Council

The Weikes & Slattery Group | Wells Fargo
Managing Director and Wealth Partner

New York, New York

- Specializes in family office wealth management and high-level executional services for ultra-high-net-worth families, C-suite executives, and foundations.
- With over 17 years in the industry, she known for her executional excellence, offering comprehensive investment strategies, portfolio management, and access to JPMorgan Chase’s full suite of services, including philanthropic advisory and estate planning.
- Passionate about financial literacy and diversity, supporting initiatives such as The Liz Weikes Scholarship for Women in Finance and serving on the Board of Visitors for the Colin Powell School at City College of New York.
- Named Barron’s Top 100 Women Financial Advisors from 2018 to 2024.
- Named Forbes Top Women Wealth Advisors Best-In-State in 2024.

Stephanie Gularte

Women’s Leadership Alliance
Chief Executive Officer

Saint Petersburg, Florida
916-201-8874

- Motivated to help, nurture, and empower others, Stephanie is driven in her role as Executive Director for the WLA.
- With over 20 years of leadership experience in both start-ups and established non-profit organizations, she excels in creating sustainable programs through engaging board members and community stakeholders.
- As a certified coach and trainer with the Nonprofit Leadership Center of Tampa Bay, she empowers leaders and organizations to thrive, also facilitating Nonprofit CEO Circle sessions.
- Mentor to MBA students at the University of Tampa, guiding young professionals to clarify their goals and plans, while also contributing to civic planning projects across both coasts.
- As Executive Director of WLA, she is dedicated to expanding the organization’s reach and partnerships, helping more women explore and succeed in financial advisory careers while fostering long-term growth.

Lee Behensky, MPM, CFRE

Women’s Leadership Alliance
Chief Operations Officer

Trinity, Florida
727-366-8799

- Executive-level nonprofit leader with 20+ years of experience strengthening mission-driven organizations through strategic planning, financial stewardship, fundraising, and operational leadership.
- Former Executive Director of Quantum Leap Farm and President/CEO of 4C Strategy, with a track record of scaling organizations, diversifying revenue, and building sustainable systems.
- Proven partner to boards and executive teams, overseeing budgets, forecasting, compliance, governance, building fundraising teams, strategic and cross-functional implementation of strategic priorities.
- Certified Fundraising Executive (CFRE) since 2002, with deep expertise in fundraising growth, capital and planned giving, and aligning resources to maximize mission impact.

Tracy Christensen

Women's Leadership Alliance
Programs & Community Engagement Manager

Tampa, Florida
719-213-7918

- Over 8 years of helping to support and organize community outreach and events for nonprofit organizations
- Over 15 years of experience as an educator, specializing in creating and implementing differentiated instructional strategies to ensure academic growth and success of students
- As Programs & Community Engagement Manager of WLA, she is dedicated to ensuring the organization's operational policies and collaborating with senior leadership to manage budgets and support strategic planning in support of its mission.

WLA AMBASSADOR

JOIN
Ambassador
Community

Ambassador
LOGIN

Ambassador
FACEBOOK

Women's Leadership Alliance

Changing the Conversation

WLA **WEBSITE**

BOARD **PORTAL**

Password: WLABOD2026$

PO Box 55186
St. Petersburg, Florida 33732

727-300-3171 ext.800

EIN: 81-3732234