

# NEWS

For immediate release

**Media Contact:**

Dori Thomas  
Impact Communications, Inc.  
913-649-5009  
[DoriThomas@ImpactCommunications.org](mailto:DoriThomas@ImpactCommunications.org)



**E Q U I T A**  
FINANCIAL NETWORK

## **Equita Financial Network Named by *InvestmentNews* as One of the Fastest Growing RIAs in the Nation**

*The financial advisory firm also announces the addition of iRebal and AIM to their platform for women-led financial planners*

**FORT WASHINGTON, PA (February 27, 2025)** – [Equita Financial Network](#) (Equita), a leading platform committed to empowering women-led registered investment advisory (RIA) firms, has been ranked as one of the fastest-growing RIAs in its category by [InvestmentNews](#). This recognition is a testament to Equita's remarkable growth, industry leadership, and commitment to empowering women in financial services.

Every year, *InvestmentNews* reports and then ranks the top 74 fee-only RIAs based on a variety of key metrics, such as growth in assets under management (AUM), client acquisition, and revenue. Equita's ranking on this prestigious list demonstrates its ongoing success in providing robust resources and facilitating a collaborative environment for independent, women-led firms.

This year, Equita rocketed up to 9th among the fastest-growing fee-only RIAs with under \$500 million in AUM after not making the list last year. Securing a position in the top 10 underscores the organization's exceptional growth in 2024, achieved through strategic partnerships and an unwavering dedication to its mission. The placement highlights Equita's success and its influence on reshaping the RIA landscape by being a growth engine and championing collaboration for women in financial services.

"We are proud to be recognized among the fastest-growing RIAs in the country," said Katie Burke, CFP®, co-founder of Equita Financial Network. "This is a validation of our mission to create a strong community where female financial advisors can thrive. Our growth is reflective of the demand that is increasing towards inclusive and independent financial advisory services, which truly put the needs of the client first."

**NEW PORTFOLIO SOLUTIONS ADDED TO THE EQUITA PLATFORM**

To support its remarkable growth, Equita has integrated [iRebal](#) and [Advyzon Investment Management \(AIM\)](#) into its platform as additional portfolio solutions.

“If a member wants to have more flexibility with their investment solutions, Equita has a variety of options to suit your planning style,” said Equita co-founder Bridget Grimes, CFP®. “In addition to our outsourced CIO, proprietary Equita Models, and dedicated trading team, members can also manage their clients’ portfolios without a lot of oversight and control.”

iRebal, a portfolio rebalancing program from Schwab Advisor Services, streamlines the traditionally complex and time-intensive rebalancing process. This tool enables Equita members to efficiently adjust client investment allocations to meet individualized financial objectives.

Advyzon provides a comprehensive service and technology platform designed to enhance portfolio management for financial advisors and investment managers. Its cloud-based solution combines portfolio management, customizable performance reporting, trading and rebalancing, web portals, mobile apps, CRM, client billing, and secure document storage, along with full service investment solutions and a robust model marketplace offered by Advyzon Investment Management.

## **ABOUT EQUITA FINANCIAL NETWORK**

Equita Financial Network (Equita) provides a signature platform with the necessary resources to run a comprehensive financial planning and investment management firm. In addition to providing proven resources, Equita provides a powerful community of support for women-led, independently operated, fee-only financial planning firms. Equita is an SEC Registered Investment Advisor (RIA) that allows Member firms to conduct business as a DBA, thereby avoiding the need for Member firms to register with the State or SEC. Equita does not take an equity stake in any Member firm. Member firms maintain their own independent, autonomous brand. Members own their client relationships - always. The Equita platform is intentionally priced so that women business owners can keep more of what they make. Equita provides a robust and structured network component to support collaboration across member firms, sharing of best practices, and client solutions + advocacy, education, and succession planning options. In-person and virtual gatherings support the exchange of information and ideas between like-minded professionals who share freely and support one another. Having an abundance mentality is an essential element of success when a woman becomes a part of the Equita community. Equita also provides the opportunity to uncover potential partners for emergency continuity planning and/or succession planning purposes. Member firms are CERTIFIED FINANCIAL PLANNER™ Professionals or will commit to earning the designation. The brainchild of co-founders Katie Burke and Bridget Venus Grimes, Equita celebrated its sixth anniversary in May 2024. Created in 2018 by these two tenured CFP®s, Equita’s structure and benefits are based on their own experiences, working every day in the trenches as RIA business owners themselves. To learn more about Equita’s powerful community and proven resources, visit [www.EquitaFN.com](http://www.EquitaFN.com).

**\*Important Disclosures:** Investment advisory services offered through Equita Financial Network, Inc. an Investment Adviser with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training.

###