

F3: Female Forward Finance

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Taking your seat at the table you built



It's back-to-school season, not just for students, but for professionals and business owners who never really left the classroom. As a founder, you're constantly learning: adapting, pivoting, building, rebuilding. It's one of the toughest and most rewarding educational journeys out there.

But here's something I see often, and it still surprises me: even after building and selling successful businesses, many women still find themselves on the sidelines when it comes to managing their personal wealth. Not because they lack knowledge or capability, but because the financial industry hasn't always made space for their full participation. That's changing. And I'm here to make sure of it.



You wouldn't guess it now, but I spent much of my early life feeling like I just couldn't keep up. I had undiagnosed ADHD, which made traditional learning environments really difficult. I struggled to sit still, retain information, and keep pace, especially compared to my older sister, who thrived in school and went on to earn multiple advanced degrees.

I've always deeply admired her, but it was tough not to compare myself. And, in that comparison, I often came up short in my own eyes.

The turning point came thanks to my dad. He reminded me that not everyone learns the same way and that my path would look different—not “less than.” He recognized my curiosity, my love of people, and my instinct for business. He believed finance could be my lane for learning and success—and he was right.

That early encouragement became the foundation for my career. Today, I get to help other women step into their financial confidence—often in unconventional ways—and build a future that reflects their values, goals, and unique journeys.

Why this matters

Here’s the reality: many high-achieving women, even those who’ve built, scaled, and exited companies, still feel underrepresented or underestimated in wealth-planning conversations.

This isn’t about lack of capability. In fact, data show that women now earn the majority of advanced degrees and are leading innovation across nearly every industry. Yet, in couples and families, the financially “dominant” partner is still often assumed to be male—even when that’s not the case.

We believe it’s time for a reset. Not a fight for power, but an intentional shift toward shared knowledge, shared decision-making, and full inclusion.

What we do differently

On our team, financial inclusion isn’t just a philosophy—it’s built into how we work. One of the ways we put this into action is by ensuring **both partners are actively involved in every planning conversation**, especially when one has historically taken a back seat in financial matters.

We do this because we believe every voice at the table adds value—and every partner should have clarity, confidence, and agency when it comes to wealth planning.

Women are already outperforming expectations in education and entrepreneurship. The next step is making sure that success translates into informed financial decisions, across all aspects of life, from investing to estate planning to legacy design.

Financial planning=continuing education

Financial planning is, at its core, an ongoing learning process. You don’t need a finance degree to feel in control of your wealth; you just need the right environment and the right guide.

Many of the female founders we work with tell us:

- After exiting their businesses, they felt less confident navigating personal wealth than they did running a company.

- They didn’t know what they didn’t know about tax strategy, legacy planning, trusts, or how to repurpose their capital for new ventures.
- They wanted to stay involved in growth in ways that felt purposeful, not overwhelming.

If that resonates, you’re not alone. These are incredibly smart, capable women—they just haven’t been invited into the conversation in the right way. That’s where we come in.

The top three steps you can take right now to ensure the financial agency with your capital

1. **Make your voice part of the process.** Whether or not you manage the finances, your input matters and should be reflected in every planning conversation.
2. **Approach your financial strategy as an evolving curriculum.** Ask questions. Seek clarity. Make sure your advisor prioritizes education, not jargon.
3. **Align your capital with your next chapter.** Whether you’re starting something new, joining a board, or focusing on legacy, your wealth should support the life you’re intentionally designing.

Final thought

You’ve already built something meaningful. Now is your opportunity to ensure your wealth is just as thoughtfully structured—and just as empowering.

Financial confidence doesn’t come from knowing everything. It comes from being engaged, informed, and supported by professionals who respect your voice and your vision.

You don’t need another degree to step into that space. Just the right team, the right tools, and a plan designed for where you’re headed next.

Onward,
Jill

P.S

If you’re at a transition point—preparing to exit your company, thinking about what legacy looks like, or just wanting to feel more engaged in financial conversations—let’s talk. I’d love to help you map out what comes next and make sure your capital is working as hard as you are.

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