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PRESS RELEASE

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Women's Leadership Alliance Announces Prominent New Board Appointments

Nonprofit seeks to increase representation of women in financial advising

[St. Petersburg, FL,] The Women's Leadership Alliance (WLA), a nonprofit, 501(c)3, firm-agnostic organization, continues to build its industry influence with the recent addition of three esteemed professionals to its advisory board and its board of directors. This expansion signifies the organization's commitment to building industry collaboration to make advances in improving gender representation in the financial advising profession.

New members of the organization's advisory board include **Cary Carbonaro**, CFP® Professional, MBA, Managing Wealth Advisor at Ashton Thomas Private Wealth and **Kellie Brady**, Managing Director and Market Executive at UBS. The board of directors of the WLA welcomes **Jessica Guo**, CIMA® CFP® CPWA® CRPC®, Managing Director at UBS.

"The addition of these industry leaders to our governing and advising boards is a significant step in furthering our work, establishing a nationwide, firm-agnostic collaboration to identify and implement strategies to increase the representation of women in the financial advising profession," said Stephanie Gularte, Executive Director of the Women's Leadership Alliance.

With these newly appointed leaders, the WLA is poised to expand its reach and impact in championing gender diversity in the financial services industry. The organization continues to foster collaboration and innovative approaches through mentorships, a national membership community, and university partnerships, to address the specific challenges faced by women advisors.

In addition to her twenty-five years' experience as an advisor, Carbonaro is the author of *The Money Queen's Guide and Women and Wealth: A Playbook To Empower Clients and Unlock Their Fortune*, and has been recognized on Investopedia's Top 100 Financial Advisors list six times. And in April 2025, she released the publication *Women and Wealth: A Playbook to Empowering Clients and Unlocking Their Fortune*.

"My passion has always been empowering women in financial services, and joining the Women's Leadership Alliance is a natural extension of that mission. It's an opportunity to drive meaningful change and support future leaders," stated Carbonaro.

Brady has over twenty years of leadership experience in the financial services industry and currently spearheads the wealth management business for UBS in Manhattan. Passionate about creating opportunities for women, Brady expressed her enthusiasm for this new role.

"I am honored to join the Women's Leadership Alliance and look forward to collaborating with its talented members to inspire and support the next generation of female advisors in our industry," said Brady.

Guo is a Senior Portfolio Manager, Private Wealth Advisor and International Private Wealth Advisor, an accreditation that enables her to work with clients who are global citizens. She was named as a "Best-in-State Advisor" and "Top Women Advisor" (Top 100 in the country) by Forbes for seven consecutive years.

Guo comments, "I am excited to carry on the mission of the WLA to promote the next generation of women advisors. Charge forward and pay forward!"

Tricia Kasner, chair of the advisory board, shared her insights: "The strength of the WLA lies in its ability to unite diverse voices and perspectives from across the industry. I am honored to welcome our new advisory board members and look forward to harnessing their expertise to drive systemic change."

WLA Board President, Kimberlee Bouska, emphasized the importance of collaboration: "Together, we can create a supportive environment for women in our industry. These new additions to our boards bring invaluable experience and a shared commitment to fostering diversity and inclusion in financial advising."

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History of the Women's Leadership Alliance

The Women's Leadership Alliance (WLA) is a 501(c)(3) nonprofit organization was founded in 2017 by a group of leading female financial planning professionals from around the country. The alliance seeks to attract more women into the financial planning industry and to provide impactful resources and empowering support to women financial planning professionals. The organization is dedicated to transforming the field of financial advisory services and strives to significantly increase the ranks of women to better represent the diversity of clients the industry serves.

Vision

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

Mission

To attract, develop, and empower women to build thriving and fulfilling financial advising careers.

WLA Board of Directors

The governing board of the WLA are leaders and fiduciaries of the organization's mission, strategic direction, financial sustainability, and donor stewardship.

WLA Advisory Board

A firm-agnostic body of financial advising industry professionals partnering with the Executive Director and the Board of Directors of the WLA to identify solutions and advocate for industry-wide actions to attract empower, and advance women in the financial advising profession