

Leading Women in Finance - Boston



From L to R: Marissa Malone, Carol Cassoli, Debra Brede, Margaret Welborn, Kelli Adams, Heather Schirmer Mahoney, Laurie Wexler Gerber
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GW & Wade's holistic approach to financial advising allows clients to rely on them for everything from investment management and taxes to estate planning and retirement planning. The firm developed a unique Women & Wealth program to advise women on how to build a vision of a financially secure future and make the most of their financial lives.

Kelli Adams, Principal and Counselor at GW & Wade shares her thoughts on the program, "Our clients rely on us for every aspect of their financial planning, and we're particularly passionate about empowering women to manage their own wealth."

The firm's Women & Wealth Initiative regularly creates content and invites

women to attend events that empower and equip their decision making and financial planning. "I got into this industry because my mom used her own knowledge of finances to invest in my life and my future, and that's what I want to do today with my own clients," Kelli says.

"When I am working with couples, I feel it's important to have both people involved in the process and so I will sometimes visit my clients in their homes to make it more convenient, and I help them think through issues that don't just affect their financial health, but also influence and improve their relationships with the people they love most. 'How can I empower others, including both men and women to build better lives?' That's the question I ask myself every day, and that's what this job is really about."



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