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Women Build Confidence, Clarity,
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Redefining Wealth

How Geeta Brana Is Helping Women Build Confidence, Clarity, and Financial Freedom

Geeta Brana exudes poise, grace, and quiet strength. It's easy to imagine that her life is defined by steady success – a thriving business, two fantastic children, financial achievement, growing influence, and a local community of loyal, supportive friendships. Yet when you dive deeper into Geeta's story, you see that her success was built on grit, resiliency, and a passion to revolutionize how women approach finances.

By any measure, Geeta Brana is a trailblazer. With over 28 years in global markets, she has built a career that blends technical expertise with personal purpose. But Geeta isn't just navigating wealth management — she's reshaping it for women. Her firm, Geeta Brana Wealth – Financial Services for Women, was founded to eliminate financial barriers and empower women to take charge of their economic futures.

At the core of her work is a belief that financial literacy isn't a luxury — it's a necessity, especially for women often underserved by traditional models and impacted by transitions like divorce, caregiving, or widowhood.

“My goal is to reignite optimism and build a future where women feel fully equipped and empowered to pursue their financial goals,” says Brana.

Her story is one of global insight, local impact, and personal reinvention — a powerful reminder that wealth is about more than numbers. It's about security, dignity, and self-determination.



From Global Finance to Grassroots Empowerment

Geeta's professional journey began far from the U.S. — in a small town outside London, born to Indian immigrant parents. In the 1970s and 80s, few women — especially women of color — worked in high finance. But Geeta was an exception. She became one of the first British-Indian women in the UK to break into capital markets, earning a spot in a prestigious five-year financial training program. She began her career at Lloyds Capital Markets in the mid-1990s before moving into global investment banking. At Sumitomo Mitsui Banking Corporation, she structured complex debt deals across Eastern Europe, Japan, and the U.S. In 2003, she joined Smith Barney's Wealth Management division (now part of Citigroup), working under future Ellevest founder Sally Krawcheck.

"I always had a passion for economic systems and how they impact people's lives," she recalls. "But I also saw early on how few women were given a seat at the table — especially in wealth management."

After nearly two decades in global banking roles across London, Washington DC, and New York, Geeta relocated to New Jersey, where she launched her own boutique practice — focused exclusively on serving women.

A Personal Turning Point

In 2015, Geeta experienced a transformation that reshaped not only her personal life but the direction of her career. After enduring years in a toxic marriage, she made the courageous decision to leave, becoming a single mother and stepping into the unknown. It was a period of uncertainty and emotional upheaval — but also one of deep clarity.

"That moment changed everything," she says. "It gave me a new understanding of the vulnerability many women feel when they don't have full control over their financial lives. And it inspired me to help others reclaim their independence through education and action."

This experience became the foundation of her firm's mission: to help women navigate financial transitions with support, strategy, and strength.

The Power of Specialized Support

Geeta's commitment to women in transition led her to become a Certified Divorce Financial Analyst® (CDFA®) — a credential that positions her uniquely to serve both clients and attorneys in the collaborative divorce space.

Unlike traditional advisors, a CDFA brings a deep understanding of how divorce settlements impact long-term financial health. Geeta's role often includes analyzing proposed asset divisions, forecasting future cash flow, evaluating tax consequences, and ensuring that each client has a sustainable post-divorce plan in place. Geeta is also qualified to testify in court as a financial expert.

"Divorce is not just an emotional and legal process — it's one of the most financially consequential decisions a woman can make," Geeta explains. "I work with attorneys and mediators to ensure that women are not left vulnerable, but walk away with clarity and confidence."

This work, while highly technical, is also deeply human. Many clients come to her feeling overwhelmed and uncertain. Her job is to demystify the process, uncover blind spots, and help women make informed decisions that align with their values and future goals. As a result, her clients have gone on to escape bad marriages, run successful businesses, pay off debts, plan for retirement, buy their own homes, and more.

Holistic Services with a Human Touch

In addition to divorce financial planning, Geeta Brana Wealth offers a comprehensive suite of services, including investment management, retirement planning, insurance consulting, and financial education. What sets her apart is the way she integrates emotional intelligence into every interaction.

"We don't just talk about numbers — we talk about life," she says. "We talk



about what matters most, what keeps you up at night, and what your future looks like if you're empowered to make choices without fear."

Each client receives a custom strategy tailored to her lifestyle, goals, and challenges — whether she's navigating the financial fallout of a divorce, preparing for retirement, recovering from loss, or simply learning how to manage money for the first time.

Community at the Core

Geeta's work is rooted not just in personal service, but in community impact. In 2018, she founded W.H.E.E.L. (Women Helping to Educate & Enhance Life), a volunteer organization supporting women through life transitions. WHEEL's free workshops bring together expert voices across law, healthcare, grief, mindfulness, and finance to offer holistic support for women rebuilding their lives.

"WHEEL was born out of the realization that women in transition don't just need financial advice — they need a full circle of support," Geeta explains.

She also contributes consistently to community organizations such as MANAVI NJ, Steph's Place (a center for grief support), the Anne Vogel Family

Care & Wellness Center, and the New Jersey State Bar Association. Geeta regularly speaks at Rutgers Law School, sharing insights on financial planning with aspiring legal professionals.

Recognized for Excellence

In 2023, Geeta was honored as one of New Jersey's Best 50 Women in Business, a recognition that celebrated her leadership, vision, and contribution to both her industry and community. The award was especially meaningful because it acknowledged not just her financial acumen, but her impact as a mentor and advocate for women.

"It was a full-circle moment," she says. "To be seen and acknowledged not just for what I've built, but for the mission behind it — to lift up other women and guide them through life's toughest transitions."

Her firm has also been spotlighted in national publications and media segments for its innovative, women-focused model.

Lessons in Liberation

Geeta's personal growth continues to inform her philosophy as an advisor and leader. One of the core principles she shares with her clients is the power of forgiveness — not as a passive act, but as a powerful form of liberation.

"Forgiveness doesn't alter the past, but it expands the future," she says. "It's about choosing freedom over resentment, action over fear."

Her favorite quote, which she often shares with clients, reflects her belief in nurturing the right environment for growth:

“
When a flower
doesn't bloom, you fix
the environment in
which it grows —
not the flower.

— Alexander den Heijer

Changing the Way Women Experience Wealth

Through every challenge she's faced — whether breaking into international finance, rebuilding after divorce, or launching her own firm — Geeta Brana

has remained focused on one mission: helping women thrive.

While her heart and roots are in Holmdel, NJ, she has recently opened an additional location in Manhattan, NY, with expectations of serving a larger and expanding base.

She understands that wealth is more than assets. It's the ability to choose your future. It's the freedom to walk away from harmful situations. It's the confidence to start over at any stage of life.

"My mission is to help women live their best lives — with clarity, control, and financial peace of mind."

With every client she advises, every workshop she leads, and every woman she empowers, Geeta Brana is redefining what wealth means — and proving that when women are financially strong, families and communities grow stronger too.

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