



United Capital Brings Finance Industry Mentors and Trailblazers to Women's Leadership Summit

Financial life management firm highlights commitment to diversity with career development event

Newport Beach, Calif. (Sept. 20, 2018) – [United Capital Financial Advisers LLC](#) (“United Capital”), the country’s first and largest [financial life management firm](#), is proud to foster mentorship and career development opportunities for the women of the United Capital team at the firm’s Women’s Leadership Summit, taking place Sept. 24-26 at the Marriott in Newport Beach, California.

The summit connects women at United Capital with trailblazing female industry leaders throughout the financial services industry. They will share their insights on building their careers as advisors and connecting with female clients. Guests include Andrea Lisher, managing director at JP Morgan; Pam Norley, president of Fidelity Charitable; Danielle Papandrea, managing director at BlackRock; Kahne Krause, vice president and head of advisor communities at Dimensional Fund Advisors; Iwona Cholewa, head of Women’s Wealth Initiatives at Dimensional Fund Advisors; and Nikolee Turner, managing director of Business Consulting Services at Charles Schwab. Kara Murphy, the first woman to hold the position of CIO at United Capital, will also moderate a panel on gender demographics and mentoring.

“There is a tremendous need for mentorship among women in an industry that is still predominantly made up of white men,” said Cary Carbonaro, co-chair of the Women’s Leadership Summit and managing director at United Capital’s New York branch. “Everyone at the Leadership Summit has faced the same challenges and sees the same opportunity for female advisors to show their distinctions and claim their seats at the table.”

The Women’s Leadership Summit will also be a resource to help United Capital’s female advisors improve their ability to connect with women seeking financial life management, said Emily Sanders, co-chair of the summit and managing director at United Capital’s Atlanta branch. “At United Capital, we have developed tools like [Honest Conversations®](#) to engage everyone in a household, not just the traditional breadwinner. We believe female advisors are especially adept at understanding the financial life priorities and challenges women face, and I’m excited to gather so much of this expertise in one venue.”

“With women making up three quarters of the attendees and 100 percent of the panels, the United Capital Women’s Leadership Summit shows true representation of the value female



advisors bring to the financial services industry,” said CEO Joe Duran. “In order to grow and better our firm, we have to challenge the ideas and assumptions we take for granted. The women at United Capital play an indispensable role in shaping the financial life management ethos that has transformed our industry, and our Women’s Leadership Summit reflects the value they bring to our team.”

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About United Capital Financial Partners

United Capital Financial Partners, Inc., the parent company of United Capital Financial Advisers, LLC (“United Capital”) and its consulting affiliate, is an independent financial life management firm, ranked #2 in the [Barron’s 2018 list of Top 40 RIAs Firms](#). United Capital is a Registered Investment Adviser (RIA) offering client objective advice and an open architecture platform that enables a wide array of investment management solutions tailored specifically to client needs. Today, United Capital has approximately \$21.6 billion in assets under management and 86 offices nationwide. For more information, please visit www.unitedcp.com.

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