Women now control 51% of global wealth, a percentage which is only sent to rise further, according to research from the Bank of Montreal’s Wealth Institute – and as these numbers spiral, a need for advisors who can empathize with and give a level of comfort to the clients they serve will need to grow in tandem.

Still, according to the CFA Institute, only 19% of CFAs are women – and as the industry leaders that we spoke to will attest to, the demographics are still weighted heavily in the male favor throughout the private wealth space. However, these 50 women – and their successors – are determined to encourage a change in those statistics. With opportunities set to grow dramatically in the coming years for financial services professionals, meet the pioneers flying the flag for female equality.

Managing the wealth planning division at Abbot Downing, Lisa is responsible for services including the Abbot Downing Clarity Process, financial and wealth transfer planning, and financial administration. Lisa is based in North Carolina and has provided tax and financial planning services to affluent clients and families for 30 years. She previously served as regional managing director for Wachovia’s Financial Planning group and spent the first 11 years of her career with Arthur Andersen, where she was a senior manager of the personal financial planning and family wealth planning group. Lisa is a Certified Public Accountant (CPA), a CFP® professional, and earned the Personal Financial Specialist (PFS) designation from the American Institute of CPAs.

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