



Megan Gorman Named to Forbes Top Women Advisors Best in State

Chequers Financial Management proudly announces that Megan Gorman has been named to the Forbes 2022 list of America's Top Women Wealth Advisors

SAN FRANCISCO, CA, USA, February 22, 2022 /EINPresswire.com/ -- Chequers Financial Management, a boutique of independent, seasoned and objective advisors, proudly announces that Megan Gorman has been named to the Forbes 2022 list of America's Top Women Wealth Advisors – Best in State. The prestigious rankings includes fewer than 3.5% of all female advisors and are compiled by [SHOOK Research](#), which researches, interview and assigns rankings based on qualitative and quantitative criteria.

Chequers Financial Management was founded to be a new type of wealth management firm that focuses on building and growing long-term relationships with client's to serve their needs for today and future generations. Chequers provides sophisticated, tailored advice to clients ranging from entrepreneurs, corporate executives, high net worth individuals and families, providing them access to an ecosystem of direct private investments, specialized alternative investments and asset classes.

Megan Gorman, managing director of Chequers, is a seasoned advisor and tax attorney who works with clients on a range of issues from negotiating executive compensation to due diligence on investments to the intricacies of complex tax management. Earlier this year, Chequers was named the number three fastest growing female owned registered investment advisor (RIA) by RIAEdge, a division of Wealthmanagement.com.

In 2020, Megan was appointed as a trustee and board member to the National Endowment for Financial Education (NEFE), a \$200 million endowment whose mission is to champion financial education and a literacy. Additionally, she serves as the Vice Chairman to the investment and audit committees.

The rankings developed by SHOOK research are based on data provided by more than 15,000 top-performing women advisors nationwide, evaluating several factors including assets under management, industry experience, and compliance records.

About Chequers Financial Management

Chequers Financial Management is a boutique of independent, seasoned and objective advisors.

We guide our client's through the challenges and opportunities associated with managing substantial wealth in a dynamic, engaging and meaningful way. Our exclusive, hand-selected client list ensures we are able to deliver tailor-made solutions and dedicated service of the highest caliber. We help wealth endure.

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