



MEGAN GORMAN NAMED FOR THE SECOND YEAR IN A ROW TO INVESTOPEDIA'S TOP 100 FINANCIAL ADVISORS 2022

The annual list honors some of the most engaged and influential financial advisors who have demonstrated top-of-the-industry skills

SAN FRANCISCO, CA, USA, July 18, 2022 /EINPresswire.com/ -- MEGAN GORMAN OF CHEQUERS FINANCIAL MANAGEMENT

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Chequers Financial Management, a boutique of independent, seasoned advisors, proudly announces that Megan Gorman, Managing Director has been named to Investopedia's list of Top 100 Financial Advisors for the second year in a row. The annual list honors some of the most engaged and influential financial advisors who have demonstrated top-of-the-industry skills in reach, community support and commitment to financial literacy.

Investopedia's annual rankings celebrate financial advisors who are making a significant contribution to financial literacy, investing strategies, life-stage planning and wealth management. The three categories for judging are equally weighted and are defined as:

- Reach – digital presence across company website, social media and other platforms such as video, broadcast and print media.
- Community support – nominated by peers and industry professionals.
- Commitment to financial literacy – participation in workshops, programs, non-profits and collaboration with others in the community to spread financial education to those who need it most.

Megan has served as a trustee and board member to the National Endowment for Financial Education (NEFE) since 2020 and serves as the Vice Chairman to the investment and audit committees. NEFE, a \$200 million endowment, mission is to champion financial education and literacy. NEFE debuted its first programs over four decades ago and envisions a nation where everyone has the knowledge, confidence and opportunity to live their best financial life.

As a seasoned advisor and tax attorney, Megan 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.

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.

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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