



# Bridging the Wealth Gap: Women, Money, and Momentum

By Roberta Keller, Founder | CEO of Alexis Advisors, LLC



It's remarkable to think that just 50 years ago, women couldn't open a credit card or apply for a loan without a male co-signer. The 1974 Equal Credit Opportunity Act changed that, granting women the right to financial independence—a milestone that reshaped generations.

Fast forward to today, and women have made tremendous strides in entrepreneurship and influencing the global economy.

Yet the numbers reveal a persistent gap. Women now control an estimated \$32 trillion in global spending—but female company founders receive just 2% of venture capital. And women only accumulate 74% of men's lifetime wealth.

Many female clients tell us they “don't know much about investing.” This isn't surprising. Research shows that many women weren't taught about investing while growing up. Unfortunately, this shows up in a multitude of ways: only 39% of women invest across account types, and 57% hold no investments at all.

Our mission is to change this narrative and this reality. Women want to engage in the money conversation - but the motivations may be different: to gain financial independence, achieve financial security for their families, build generational wealth for their children - and understand the impact their investments are having on people and the planet. And the younger generations are engaging - with 75% of women aged 30-45 report regular monthly investing habits.

My team makes it a point to support women. It's not about exclusion—it's about inclusion and recognizing that women still face unconscious bias. By educating women and aligning capital with impact, we help women build wealth with purpose—and create a more inclusive financial future.

\* Sources: UBS White Paper, March 2025; Investopedia, CoinLaw

## ALEXIS

ADVISORS

An independent, fee-only wealth management firm—  
for women (and their families), by women.

**Mindful  
Financial  
Planning**



**Socially  
Conscious  
Investing**

**Wealth Management for a Better World**

Be Informed | Be Engaged | Be Intentional

**Certified**



**Corporation**

AlexisAdvisors.com

804.625.3290



Alexis Advisors, LLC is a registered investment advisor  
in the Commonwealth of Virginia and Pennsylvania.