



WOMEN WHO MOVE THE CITY

ARNERICH MASSENA

The women of Arnerich Massena, led by Co-CEO Reagan Rae, CPWA® (1st row right) and Chief Operating Officer Shelly Kapoor (1st row left)

Arnerich Massena Co-CEO Reagan Rae didn't follow the traditional, straightforward path to becoming a financial advisor. Instead, she followed her passion - and her gift - for helping people. Her undergraduate degree is in psychology, but it wasn't until after college that she began working in the financial industry.

"After being around advisors and understanding how they engaged with clients, I was immediately hooked," she explained. "I set my sights on building a career where I could give everyone a seat at the table by making finance accessible and even inviting for investors."

Rae joined Arnerich Massena in 2012 and was immediately drawn to the firm's female leadership, a rarity in the industry, as well as the company's commitment to empowering clients. She put down her roots at the firm, becoming a firm principal in 2017 and being named the company's first female chief executive in 2021. Under her guidance, she has helped build an incredible team, including these remarkable women, who deliver personalized service and results to clients.

As a Certified B Corporation®, the firm is dedicated to making a positive impact, using the power of business to build a more inclusive and sustainable economy, and

that includes building diversity into its own leadership and advisory teams. Clients resonate with the balance of perspective that Arnerich Massena brings by having both men and woman at the investment table, too.

Rae said, "Research is fairly consistent about how men and women invest differently, and we have found that different voices bring up different ideas and concerns, all of which can be meaningful in improving long-term outcomes."

When it comes to her team, she says she is genuinely honored to be surrounded by such an amazing group of women professionals. "All of these women have self-selected into an industry that is traditionally heavily male-dominated, and they bring a level of confidence and competence that is inspiring," Rae explained. "I love that our team combines deep professionalism and expertise with genuine care for our clients, our community, and for each other. This is a passionate group."

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