

Ken Gillaspie Legacy Fund 2021 Scholarship Recipients

Congratulations to Leighann Miko and Jane Mepham!



We are excited to announce the 2021 Ken Gillaspie Legacy Fund Scholarship recipients, Leighann Miko and Jane Mepham. Both will participate in Money Quotient's [Fundamentals of True Wealth™ Planning virtual training](#) course conducted this fall.

MQ Advisory Board members head up the selection process. They review the applications and award scholarships in two areas: early career (a student or someone new to the planning industry) and established career (influencers, educators, or those with a unique focus of practice and outreach). We couldn't be happier to welcome Leighann and Jane to join us in September.

Leighann Miko, CFP® began her career in 2007 as a part-time assistant to an independent financial advisor. After becoming a Paraplanner at that firm, she went on to work at several other boutique firms in various roles. After a decade in the industry, she started her own fee-only RIA, Equalis Financial, in January 2017 with a goal to serve historically excluded communities like LGBTW+ creatives and other thoughtfully ambitious professionals.

As a naturalized citizen, unsure of who or where to turn for personal finance issues, Jane Mepham founded Elgon Financial Advisors. She designed her fee-only firm to serve successful immigrants looking for advisors who are culturally sensitive to their backgrounds. Before becoming a financial advisor, she spent over 17 years working in the high-tech field and with another national planning firm.

When we asked Leighann about her professional goals, she shared:

"My ultimate goal is to ensure that everything I do serves multiple purposes and has the greatest impact possible. I am striving to build a platform where the barriers to entry are minimal for financial planners and clients alike. I want to be able to provide financial planning for historically excluded communities, as well as provide job opportunities for underrepresented folks. Representation creates opportunities not only for marginalized communities to seek financial advice, but also for individuals to pursue financial planning as a career."

When we asked Jane to share her philosophy and approach to financial planning, she said:

"Financial planning is a process, not a piece of paper or deliverable. It is a partnership between a client and an advisor. The client is the 'expert' of their life, and the planner brings the technical knowledge and an accountability aspect to the relationship, helping the client stay the path of what they have agreed to. Financial planning knowledge and information is common, but the results must be customized and specific to the client, after all every client is unique."

A hearty congratulations to both Leighann and Jane. We have no doubt you will make excellent additions to our MQ Community and profession.