



LAZETTA  
*& associates*

# Meet Lazetta

- One of only 1,493 Black Certified Financial Planner professionals in the country
- Named one of Crain's New York 2021 Notable Black Leaders
- Ranked Top 10 of Investopedia's 100 Top Financial Advisors for 2020
- CNBC Digital Financial Advisor Council member
- Wall Street Journal (WSJ) Wealth Management Expert Blog contributor
- Co-founder and co-CEO of 2050 Wealth Partners
- Founder, Lazetta & Associates
- Chair of the Board, Association of African American Financial Advisors (AAAA)
- President, AAAA Foundation

## **LOOKING TO TRANSFORM HUMAN CAPITAL INTO EQUITABLE SOCIAL AND FINANCIAL CAPITAL?**

Lazetta Rainey Braxton, MBA, CFP®, is unearthing traditionally taboo topics in the financial services industry by helping firms who care about diversity, equity, inclusion and belonging identify how they nurture their most valuable asset... their people.







#### NOTABLE PARTNERS

THE  
WALL STREET  
JOURNAL

LinkedIn

experian.

AAAA  
ASSOCIATION OF AFRICAN AMERICAN  
FINANCIAL ADVISORS  
SUSTAINABLE FUTURE

Fidelity  
INVESTMENTS

zoom

nextgen  
Nasdaq



About Lazetta

For Lazetta Rainey Braxton, MBA, CFP®, it's all about doing the work.

Lazetta is passionate about amplifying diversity, inclusion, equality and belonging in the financial planning profession, and does so through financial planning, public speaking, consulting, and coaching.

A sought-after financial expert, Lazetta delivers keynote presentations and workshops with both care and urgency that invite attendees to secure their legacies one dollar at a time.

Through her consulting practice, Lazetta & Associates, she employs a "no fear, no shame zone" to help financial services firms nurture culturally aware and hospitable workplace environments that ignite innovation and allocate equity amongst their employees.

Lazetta also serves as co-CEO of 2050 WealthPartners where she provides access to financial planning to everyday people who desire financial freedom to influence, experience, give and make a difference for their family and future generations.

Recognized for her leadership, entrepreneurial spirit, and dedication, Lazetta was named as a 2021 Crain's New York Business Notable Black Leader and Executive, as well as one of the top 10 of Investopedia's 100 Top Financial Advisors in 2019 and 2020. Investment News' honored her as one of its inaugural Women to Watch and Excellence in Diversity and Inclusion recipients. She also received the Association of African American Financial Advisors' Leadership Legacy Award and the Heart of Financial Planning award from the Financial Planning Association. Lazetta currently serves as Chair of the Association of African American Financial Advisors (AAAA), Founding President of the AAAA Foundation and a member of the Grace Church School Finance Committee.

Lazetta, a nationally-recognized financial expert, has appeared on NBC Nightly News with Lester Holt, Nightly Business Report, and CNBC's Closing Bell. She is a member of the CNBC Digital Financial Advisor Council and a contributor on Wealth Management to the WSJ Experts blog. In all her endeavours, she is on a mission to create wealth for the common good. Notable Partners



# *A Fresh Perspective on Finance*

## **SPEAKING ENGAGEMENTS**

Whether speaking to a conference room of 500 or a workshop of five, Lazetta brings decades of experience, expertise, and her infectious smile front and center to every event - creating engaging conversations about how leaders in the financial services industry can capture and unlock human capital within their firms.


She views this work as educating, enlightening and empowering financial leaders to make the profession an honorable one.

Organizations may select from one of her signature presentations or request a bespoke event that's tailored to its specific needs. Every presentation is delivered with candor, mindfulness, inspiration and energy.

*"Wealth management  
could use a greater  
injection of emotional  
intelligence in it's system."*

*- Lazetta Rainey Braxton,  
MBA, CFP®*





*"We really enjoyed hearing from Lazetta at the FPA of Puget Sound's Symposium, as she gave our opening keynote and tackled the challenging topic of diversity. She did so in a way that was disarming and enlightening, and the lessons drawn from the talk could easily be translated to situations well beyond simply caring for those that are different from us. At its core, her message was about knowing, appreciating, and serving each person's unique story – while recognizing that story is often in the context of a greater cultural narrative. On top of this, she and her team were easy to work with in preparing for the event."*

**Andrew Barfoot, CFP®, COO, Financial Advisor (Madison Park Capital Advisors), FPA of Puget Sound Symposium Chair (2019-2020)**

*"In an audience of thousands, Lazetta makes you feel like she's speaking directly to you. Her keynotes are always engaging, leaving you on the edge of your seat when she speaks. Without a doubt you will leave with an enlightened perspective. If learning and growing is what you're seeking, then Lazetta's keynotes are not to be missed."*

**Rianka R. Dorsainvil, CFP®, Founder, Creator & Host, 2050 TrailBlazers**





# *A Meeting of the Top Financial Minds*

## **CONSULTING AND EXECUTIVE COACHING**

Through her virtual consulting practice, Lazetta & Associates (L&A), Lazetta and her experienced team of professionals guide registered investment advisor firms to nurture culturally aware and hospitable workplace environments that ignite innovation and allocate equity amongst their employees. The financial planning profession and consumers alike benefit when RIA firms equitably distribute the financial and social capital generated by the firm's human capital. L&A is committed to helping firms stay relevant in an increasingly diverse environment.

Organizations can expect well-researched, straightforward, and insightful consultative sessions which entail examining, analyzing, and understanding their approach, attitude, practices and processes around Diversity, Equity, Inclusion, and Belonging (DEIB) to leave them ready and able to stimulate future growth, innovation, and sustainability.

“As a veteran member of the financial advisory profession, I have witnessed very few financial experts who speak with such eloquence, brevity and clarity as Lazetta. Her commitment to serving underrepresented populations has inspired individuals, professional colleagues, and corporations to take seriously the business imperative of Diversity and Inclusion.”

-LeCount R. Davis CFP®, Founder - Association of African American Financial Advisors (AAAA) & AAAA Foundation, Author, *One Step Back, Two Steps Forward*



"Lazetta and I served on an advisory board together focused on increasing the diversity of the financial advisor workforce. Lazetta did not hesitate to address the hard questions and was a leader in working through the sensitive issues that were frequently part of the conversation. Her passion, candor and lived experience made her contributions critical to the discourse and outcomes of our board's mission."

- Carol Fishman Cohen, Chair and Co-founder, iRelaunch

*Let's Connect*

***Learn more at [www.lazetta.com](http://www.lazetta.com)***

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