



E Q U I T A

F I N A N C I A L N E T W O R K

Equita Financial Network, Inc.

500 Office Center Drive
Suite 400
Fort Washington, PA 19034

1.800.604.0176

Dated March 27, 2024

www.equitaFN.com

Form ADV Part 2B – Brochure Supplement

For

Stefanie D. Crowe, MBA, CFP®

Investment Advisor Representative

This brochure supplement provides information about Stefanie D. Crowe that supplements the Equita Financial Network, Inc. (“Equita”) brochure. A copy of that brochure precedes this supplement. Please contact Kathleen Burke if the Equita brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Stefanie D. Crowe is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 2305425.

Item 2: Educational Background and Business Experience

Stefanie D. Crowe, MBA, CFP®

Born: 1969

Educational Background

- 1991 – Bachelor of Arts, University of Notre Dame
- 2003 – Master of Business Administration, University of Tennessee at Chattanooga
- 2022 – Certificate in Financial Planning, Boston University Center for Professional Education

Business Experience

- 06/2020 – Present, Equita Financial Network, Inc, Investment Advisor Representative
- 06/2020 – Present, AegleWealth, LLC, Founder and CEO
- 09/2016 – 06/2020, Stone Bridge Asset Management, LLC, Director of Wealth, Knowledge and Happiness
- 06/2015 – 06/2016, SmartBank (formerly Cornerstone Community Bank), Chief Strategy Officer
- 10/2007 – 05/2015, Pinnacle Financial Partners (formerly CapitalMark Bank & Trust), Director of Wealth
- 01/1996 – 9/2007, Bank of America/US Trust, SVP & Relationship Manager (Trust & Wealth Services)

Professional Designations, Licensing & Exams

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct (“Code and Standards”)*, which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Item 3: Disciplinary Information

No management person at Equita Financial Network, Inc. has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Stefanie D. Crowe is principal owner of AegleWealth, LLC. This activity accounts for 90% of her time.

Ms. Crowe is Co-Founder and General Partner of JumpFund Management I & II LLC and angel investment funds (JumpFund I & II), which invests in female-led start-ups domiciled in the southeastern USA. She dedicates 5 hours monthly. For both funds, General Partners managed capital raises (2013 and 2016 respectively for the launch of each fund). The General Partners host an annual investor summit with portfolio company founders and work actively with the startups to serve as a resource and guide as they grow. General Partners may be asked to speak or present at events that support the startup/innovation ecosystem, or events that are focusing on female leadership within the startup community - both as investors and as company founders/executives.

Item 5: Additional Compensation

Stefanie D. Crowe does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services except through Equita.

Item 6: Supervision

Jim Cullen, Chief Compliance Officer of Equita, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.