



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.

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Dated May 21, 2024

[www.equitaFN.com](http://www.equitaFN.com)

Form ADV Part 2B – Brochure Supplement

*For*

**Amy M. Hamasaki, CFP®**

Investment Advisor Representative

This brochure supplement provides information about Amy Hamasaki that supplements the Equita Financial Network, Inc. (“Equita”) brochure. A copy of that brochure precedes this supplement. Please contact James Cullen 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 Amy Hamasaki is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) which can be found using the identification number 3134169.

# Item 2: Educational Background and Business Experience

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**Amy Margaret Hamasaki, CFP®**

Born: 1975

## Educational Background

- 1997 – Bachelor of Arts, Global Economics, University of California at Santa Cruz
- 2018 – Financial Planning Certificate, Bryant University

## Business Experience

- 05/2024 – Present, Equita Financial Network, Inc., Investment Advisor Representative
- 09/2020 – Present, Mountain Wealth Planning, LLC, President
- 09/2021 – 08/2023, Origin Financial, Financial Advisor
- 02/2019 – 09/2020, Mariner Wealth Advisors, Wealth Advisor
- 12/2017 – 01/2019, Block Advisors, Tax Professional

## 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](http://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*.

**Enrolled Agent (EA):** An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years.

## Item 3: Disciplinary Information

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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

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Amy Hamasaki is the President of Mountain Laurel Planning, LLC which serves as a marketing name for advisory services provided under Equita Financial Network, Inc.

## Item 5: Additional Compensation

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Amy Hamasaki does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Equita.

## Item 6: Supervision

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