

INSPIRING VOICES:

*Amy Webber,
CEO & Co-Chairman of the Board,
Cambridge Investment Group*



INTRODUCTION

As a woman-owned firm, we celebrate the achievements and contributions of women who inspire collaboration, innovation, and excellence in their professional and personal lives. To celebrate Women's History Month, we invited a few of these remarkable women to share their insights and experiences, highlighting unique perspectives that contribute to our collective success.

Here, Mark Guglielmo a founding partner at GreenLine Consulting and a veteran in the financial industry, sat down for a candid chat with Amy Webber, Chief Executive Officer and Co-Chairman of the Board at Cambridge Investment Group, an independent financial solutions firm serving 3,800 financial professionals and their clients.

Hired as the firm's 22nd associate in 1998, Webber served in a variety of high-ranking roles before becoming the second CEO in Cambridge's nearly 45-year history, succeeding Founder Eric Schwartz in 2016. She is a member of the Financial Services Institute's (FSI) Board of Directors, helped establish Cambridge's Community of Women (CCW), New Century Council, and The Next Step® internship program, and delivers valuable insights through her biweekly 'Cambridge Stronger' podcast series.

Webber's leadership is widely recognized across the financial services industry. She has been named ThinkAdvisor's 'Executive of the Year' (2024)¹, WealthManagement.com's 'CEO of the Year' (2022)², and in 2022 received the coveted InvestmentNews Alexandra Armstrong Lifetime Achievement award³. She is a six-time member of ThinkAdvisor's 'IA 25'⁴ and was recognized as one of WealthManagerWeb's 'Top 50 Women in Wealth Management' for three consecutive years⁵. Webber also earned ThinkAdvisor Luminaries awards in the categories of Diversity and Inclusion, Thought Leadership and Education, and Executive Leadership (2021)⁶.

Here are some of her thoughts about her career journey and the lessons she has learned along the way.

INSPIRING VOICES:

Women moving business forward

Mark: You have been in the industry for over three decades, how do you view the role of mentorship in today's financial landscape, particularly in supporting the development of women?

Amy: I've had four direct bosses, each with unique personalities, backgrounds, and perspectives – from different generations and genders. Each one taught me valuable lessons. While mentorship is essential, I believe it's even more beneficial to broaden that concept to include networking. A strong network provides access to diverse viewpoints, whether from formal mentors or industry peers. Although direct bosses can serve as mentors, expanding beyond that circle allows for more open and candid conversations, especially on topics you might not feel comfortable discussing within your own organization.

Sponsorship is also a key factor. It's about finding individuals who can advocate for you and help you achieve your goals. Don't hesitate to ask for help, but be sure to make it clear that you respect their time and are prepared to demonstrate what you can offer so they can better support your progress.

Mark: Looking back, what advice would you give your younger self?

Amy: I'd advise learning to accept criticism gracefully. Rather than letting it undermine your confidence, focus on extracting value from it – even if it doesn't initially seem constructive. We can't control how others act, but we can control our reactions. Embracing this mindset earlier would have saved me a lot of sleepless nights and unnecessary stress. And always keep in mind that your reputation is your greatest asset.

Mark: As CEO, how do you maintain Cambridge's success and nurture a strong team?

Amy: Cambridge has experienced remarkable growth, and our success is built on the core belief that honoring your word is essential – that words truly matter. My personal motto is, "Do the right thing, even when no one is looking." Inclusivity and valuing diverse perspectives are also key to our success. As a leader, I focus on being adaptable, continually refining my leadership style to meet the needs of different management levels. Above all, I believe in over-communicating. It's important to clearly share your strategic priorities and goals, ensuring the entire team stays aligned and focused on common objectives.

Mark: Do you have a role model who's inspired your journey?

Amy: Eric Schwartz, the founder of our firm, has had a significant influence on me. His vision highlights the importance of integrity and keeping your word. At the same time, learning what not to do has been just as valuable. Watching others' mistakes, and making a few of my own like everybody else, has played a key role in shaping my leadership journey. I've learned not only how I want to lead but also what I want to avoid.

Mark: Anything else you'd like to add about the industry's future?

Amy: Our industry has a unique opportunity to cultivate the next generation – especially women – not just as successors to previous leaders, but as a vital investment in the future. Through strategic coaching and mentorship, we can empower them to build larger, more successful businesses and better serve investing clients — and I'm proud of the many programs we've developed at Cambridge that help advisors and associates do exactly that. One of them is our Cambridge Community of Women initiative, which has provided an incredible platform for women to connect and learn from each other. I've had the privilege of witnessing the women involved in this initiative attain remarkable growth and success. For our industry to thrive in the future, collaboration in environments like these will be essential.

About GreenLine Consultants

GreenLine Consultants (GreenLine) was founded by a team of senior wealth management veterans. Our rapidly growing team has deep expertise in IT strategy and integration, onboarding, client services and operations, growth strategies, communications, executive leadership coaching, and more. GLC excels in turning strategies into reality, serving as innovation catalysts, strategic advisors, and implementation specialists. Known for our bold and impactful approach, we place creativity and vision at the core of every engagement. Our collaborative focus ensures that each solution is tailored to client needs, delivers timely, high-quality results, and drives informed decision-making to produce tangible outcomes.

It takes a diverse team to deliver success. At GLC, we're more than just consultants; we're your partners in transforming vision into action and creating lasting impact

About Cambridge

Cambridge is a financial solutions firm focused on serving independent financial professionals and their clients while preserving its internal control. Cambridge offers a broad range of choices for independent financial professionals regarding solutions for advice, growth, technology, and independence. Cambridge's national reach includes: Cambridge Investment Research Advisors, Inc. – a large corporate RIA; and Cambridge Investment Research, Inc. – an independent broker-dealer, member FINRA/SIPC, that is among the largest internally controlled independent broker-dealers in the country. Learn more at joincambridge.com.

Footnotes

1 ThinkAdvisor LUMINARIES, Class of 2024. Award earned in category of Financial Advisory and Asset Management Firms. Finalists and winners are chosen based on nominations. To learn about the award criteria, visit <https://event.thinkadvisor.com/luminaries-awards/criteria>.

2 WealthManagement.com, Wealthies Awards, 2022. Award earned for Broker-Dealers (1,000+ advisors). Finalists are chosen based on nominations from industry peers. To learn about the award nomination and selection process, visit <https://www.wealthmanagement.com/industry/wealthmanagementcom-announces-2022-wealthies-finalists>.

3 InvestmentNews Magazine, Women to Watch awards recognize women in the industry who have demonstrated success, leadership, ability to effect change, and a willingness to help other female financial professionals and community service. Winners are selected by an InvestmentNews selection committee. For more information on the awards, nomination requirements, and selection process, visit <https://www.investmentnews.com/awards-and-recognition/women-to-watch-2022>

4 Investment Advisor Magazine/ThinkAdvisor, IA 25 2012, 2014, 2017-2020 is a recognition which identifies 25 people who readers believe have had or will have the greatest influence on the financial services industry. Results are based on reader poll.

5 WealthManagerWeb.com/ThinkAdvisor, Top 50 Women in Wealth award 2009-2011 recognizes 50 influential women leaders impacting the financial industry. Honorees are selected by an advisory board from the wealth management industry.

6 ThinkAdvisor LUMINARIES, Class of 2021. Firms and Individuals, from both the small and large investment firm space, are eligible to win in four different categories. Winners are chosen based on nominations which include qualitative and quantitative factors. To learn more about the award criteria, visit <https://www.thinkadvisor.com/luminaries-awards/>. Amy Webber was a member of the judging panel at ThinkAdvisor but did not vote for any category in which our firm was nominated.