

Tonette M. Echols, CFP®

The Perfect
PEARL *with*
PURPOSE

Candidate for Supreme Tamiouchos
Alpha Kappa Alpha Sorority, Incorporated®



Prepared. Passionate. Precise.



Greater Tasks to Begin...



Alpha Kappa Alpha Sorority, Incorporated® Delta Beta Omega Chapter Phoenix, Arizona

November 3, 2021

Soror Armisha Walker-Harrison, Chairman, International Nominating Committee

Dear Soror Walker-Harrison:

With tremendous pride and enthusiasm, the Sorors of Delta Beta Omega Chapter nominate Soror Tonette Echols for the office of Supreme Tamiouchos. Because of her hard work, commitment, and exemplary leadership, we lean on her for her guidance in several areas, most notably budget and finance, chapter operations and leadership development. Soror Echols is a Life Member and Silver Star, having enjoyed more than 40 consecutive years of membership in Alpha Kappa Alpha Sorority, Incorporated®; and is a proud member of the Delta Beta Omega Chapter in Phoenix. Tonette has served in many capacities at the local, regional and national level, including:

- Anti-Grammateus, one term | January 1988 – December 1989
- Pecunious Grammateus, two terms | January 1995 – December 1999
- Tamiouchos, two terms | January 1990 – December 1993
- Anti-Basileus, two terms | January 2000 – December 2003
- Basileus, two terms | January 2004 – December 2007
- Parliamentarian, five terms | January 2008 – December 2015; and September 2019 - Present

Soror Echols has also served on the Far Western Region's Standards Committee where she conducted standards evaluations (with an emphasis on Fiscal Fitness) and is currently a member of the region's Bylaws Committee. She was chairman of the Far Western Regional Conference in 2012, She is a former Far Western Region Tamiouchos and is currently the Far Western Region's Pecunious Grammateus. Additionally, Soror Echols has received several awards for her work in the Sorority, including the Far Western Region's Outstanding Chapter Basilei Award and the Charlene D. Carodine Unique Professional Achievement Award.

On the National level, Soror Echols has served as a member of the I-Team/E-Team during the administration of 29th Supreme Basileus Soror Dorothy Buckhanan Wilson, and was a member and trainer on the Financial Officer Certification Committee from 2014-2018. She traveled to all regions of the sorority, training approximately 900 Financial Officers and chapter members in proper financial procedures.

Soror Echols brings an impeccable professional skillset and business acumen to Alpha Kappa Alpha developed over a career in the financial services industry that spans more than 30 years. Most notably, she is President and Managing Partner of Riley/Echols Wealth Management LLC and Partner with Stratos Wealth Partners where she manages more than \$100 million in assets on behalf of her clients.

Soror Echols has demonstrated an exemplary record of sorority leadership and engagement, community service and professional achievement. A vote was taken at our regularly scheduled meeting held on Saturday, September 18, 2021. Delta Beta Omega Chapter, without reservation and unanimous vote, strongly supports the nomination of Soror Tonette Echols for Supreme Tamiouchos and believes she is the "perfect pearl with purpose".

Sincerely,

Shawn E. Gear
Soror Shawn E. Gear
Basileus

DeShea Martin
Soror DeShea Martin
Grammateus

My Dear Sorors,

It is my distinct honor to receive the endorsement of my beloved Delta Beta Omega Chapter to run for the office of Supreme Tamiouchos of Alpha Kappa Alpha Sorority, Incorporated®. I am humbled but excited and ready to answer the call of Service to All Mankind in new and innovative ways.

As a candidate for Supreme Tamiouchos, I bring more than 40 years of business acumen and unwavering dedication to our noble sisterhood. For the past decade, I have built a business as a Certified Financial Planner where I provide financial advice and guidance that encourages disciplined investment strategies for individuals, families, nonprofit and business leaders, and includes the management of more than \$100 million in assets. Within Alpha Kappa Alpha I have been an active elected or appointed officer at the chapter or regional level or an international committee member for more than 30 consecutive years. This experience has cultivated in me a deep and intimate knowledge of our organization's fiscal strengths and challenges while equipping me with the insight and perspective needed to step into the role of Supreme Tamiouchos quickly and become a contributing member of the Directorate.

During my tenure as chapter Tamiouchos and later Basileus, the Delta Beta Omega chapter thrived. Not only did Delta Beta Omega remain financially solvent, the chapter also achieved a membership growth rate that matched the national trend and supported the diversification of chapter funding streams. That in turn enabled Delta Beta Omega to expand its community service agenda during my administration and beyond.

As a former Far Western Regional Tamiouchos [2008-2012], current Far Western Regional Pecunious Grammateus, and former member of the International Financial Officers Certification Committee [2014-2018], I have established relationships and worked closely with our national and chapter leadership to strengthen our fiscal position. These experiences provide the solid foundation upon which my service as Supreme Tamiouchos will be built.

Finally, I will bring the energy, passion and commitment necessary to serve Alpha Kappa Alpha in an international leadership role. I can think of no better way to integrate my purposeful leadership abilities, precision for finance and fiscal management and passion for service. I humbly ask for your support in this election and, in return, I will tirelessly advance our community service mission, govern fiscally with transparency, and ensure our organization applies its fiscal resources to best meet the needs of our members and the communities we serve.

In Sisterhood and Service,



Soror Tonette M. Echols
Candidate for Supreme Tamiouchos



BY THE NUMBERS

45+

Years of membership
In Alpha Kappa Alpha
Sorority, Incorporated®

30+

Years of service as an
elected or appointed
officer or international
committee member
within Alpha Kappa Alpha
Sorority, Incorporated®

40

Regional Conferences
attended

16

Boules attended

7

Leadership Seminars
attended

900+

Number of Sorors trained
by Soror Tonette Echols
to become Certified
Financial Officers
of their chapters.

\$100 million

Assets managed by
Riley/Echols Wealth
Management, LLC

1.7%

Percentage of Blacks
who have obtained
CERTIFIED FINANCIAL
PLANNER™ certification.
Soror Tonette Echols is
counted among this elite
group. **Barons 1-12-2021**

Soror Tonette M. Echols, CFP®
Candidate for Supreme Tamiouchos

A Lifetime of Sisterhood and Service to All Mankind...

Through her tireless dedication, consummate professionalism, and impeccable leadership abilities committed to Alpha Kappa Alpha Sorority, Incorporated® for more than 40 years, Soror Tonette M. Echols is the Perfect Pearl with Purpose – uniquely qualified to serve our illustrious organization as Supreme Tamiouchos.

“

Tonette's Pearl of Wisdom

I learned from my parents very early on the value of hard work and paying in cash.

”



1966

The daughter of a barber and a laundromat operator growing up in Kansas City, Mo., Tonette remembers going to the bank every Monday with her father to make the deposits from the family businesses.



1972

As a teenager, Tonette works for her mother and saves “every bit” of what she earns so that she would have money for college.



1975 - 1979

Tonette enrolls at the University of Arizona as a first-generation college student majoring in Finance.

Initiated into Alpha Kappa Alpha Sorority, Incorporated®, Iota Tau Chapter. **Elected to:**

- **Tamiouchos**
- **Anti-Basileus**
- **Basileus**

Graduates with a **bachelor's degree in Finance.**

Recruited to an 18-month comprehensive Retail Management Trainee Program with Sears Department Stores.



“
Tonette's Pearl of Wisdom
Without a budget, it's difficult to establish and achieve even the most basic financial goals.
”



1980 - 1983

Tonette is appointed to a six-member retail operations management team responsible for opening new Sears Department Stores across the state of Arizona.

Breaking barriers, Tonette joins Dean Witter Reynolds as an Account Executive/Financial Advisor handling financial planning, analysis, client portfolio management and new client acquisition. At the time, she is one of only two black women in Arizona to hold this position.

Tonette joins Western Savings [later Bank of America] as Branch Manager responsible for all branch operations, including hiring and training branch personnel with a focus on sales, deposit acquisition, and lending products.

1985

Tonette affiliates with the Delta Beta Omega Chapter of Alpha Kappa Alpha in Phoenix.



"I plan to focus on relationship banking in 1987 and make that a No. 1 priority for our branch. In order for Western to beat the stiff competition ahead, we must be more aggressive in our sales efforts, and attentive to the needs of our VIP customers."
TONETTE ECHOLS

1987 - 1988

Tonette obtains her Loan Officer Certification and is featured in the Western Savings employee handbook, sharing a "Pearl of Wisdom."

Tonette leads the association in all Key Performance Indicators (KPIs) and wins the Achievement Award for outstanding performance for two-consecutive years.

Elected Anti-Grammateus of the Delta Beta Omega.
[One term/1988-1989]



1990 - 1992

Tonette joins Washington Mutual Bank as Relationship Manager/Sr. Loan Consultant leading the Phoenix office to reach the bank's highest achievements in home loan originations, refinances, home equity lending and new construction.

She exceeds all goals in sales, net profit, employee and client relations – and receives the prestigious Gold Club Award.



1992

Elected Tamiouchos of the Delta Beta Omega Chapter
[Two terms/1990-1994]



1995 - 2000

Elected Pecunious Grammateus of the Delta Beta Omega Chapter
[Two terms/1995-1999].

Elected Anti-Basileus of the Delta Beta Omega Chapter
[Two terms/2000-2003]



2001

Attained **Silver Star & Life Member** status in Alpha Kappa Alpha Sorority, Incorporated®.



2004 - 2007

Elected Basileus of the Delta Beta Omega Chapter
[Two terms/2004-2007]

Soror Tonette is honored as Delta Beta Omega Chapter's Soror of the Year.

Honored with the **Mildred L. Robinson Basileus of the Year Award** presented at the Far Western Regional Conference.

Obtained Graduate Advisor Certification. Appointed to Delta Beta Omega's **Graduate Advisory Council member** with supervision of the Zeta Alpha Chapter at Arizona State University.
[2007-2014]



2008

Appointed Tamiouchos of the FWR by the Far Western Regional Director.

[Two terms/2008-2012]

Appointed Parliamentarian of the Delta Beta Omega Chapter. [Six terms, in service to two Basilei]



2011

After joining Wells Fargo Advisors as a Financial Advisor in 2007, Tonette obtains her **CERTIFIED FINANCIAL PLANNER™** certification.



2012 - 2013

Appointed General Chairman of the FWR Conference by the Far Western Regional Director

Honored with the **Charlene D. Carodine Unique Professional Achievement Award** presented at the Far Western Regional Conference.

Appointed to the FWR SET/ SITE Team by the Supreme Basileus - responsible for conducting fact-finding investigations, interviews and chapter evaluations within the FWR. [2012 - 2014]



2014

Tonette launches her own firm - Riley/Echols Wealth Management as a partner with Stratos Wealth Management.

Appointed to the International Financial Officers Certification Committee and the "I-Team/ E-Team" by the Supreme Basileus as Finance Lead.
[2014 - 2018]





Tonette's Pearl of Wisdom

'A leader knows the way, goes the way and shows the way.' — John C. Maxwell

These words embody my steadfast commitment to lead with a cooperative spirit and sisterly care, while advancing the mission, purpose and values of Alpha Kappa Alpha.



2015

Joins the Alpha Kappa Alpha Heritage Club, a group committed to contributing \$100+ annually above dues and assessments.



2016

On Jan. 22, 2016, Alpha Kappa Alpha made history chartering its first chapter, Omega Theta Omega, in the Middle East in Abu Dhabi, Dubai. Soror Tonette joined the 600 dignitaries, family and friends who attended the historic chartering.



2020

Tonette becomes sole owner, President and Managing Partner of Riley/Echols Wealth Management offering financial guidance, disciplined investment strategies, prudent retirement, insurance and tax-sensitive investing for her clients while managing more than \$100 million in assets.



2021

Appointed as Pecunious Grammateus of the FWR
by the Far Western Regional Director.
[2020-2022 biennium]

Appointed Parliamentarian of the Delta Beta Omega Chapter [In service to the current chapter Basileus]

Appointed by the Far Western Regional Director to the FWR Bylaws Committee.
[2020-2022 biennium]

Greater Laurels to Win...

Community Leadership & Service

National Association of Parliamentarians

2008 Joined Alpha Unit
2016-2019 Treasurer
2020-Present Vice President

The Links, Incorporated

2009 Initiated Phoenix Chapter
2010-2012 Parliamentarian
2012-2016 Treasurer
2016-2020 National Trends and Services Chair
2016-Present Fund Development Chair

Top Ladies of Distinction

2015 Charter Member, Initiated Phoenix Chapter
2015-2018 First Vice President
2018-2021 President
2019-Present Elected Area VI Financial Secretary
2020-2021 National Finance Committee

Phoenix Emerald Foundation, Incorporated

2018 Organizer
2018-2020 Treasurer & Director

Awards & Recognitions

2007 Mildred L. Robinson

Basileus of the Year Award

Alpha Kappa Alpha Sorority, Incorporated®,
Far Western Region

2008 Soror of the Year Award

Delta Beta Omega Chapter

2013 Charlene D. Carodine

Unique Professional Achievement Award

Far Western Region

2016 Inaugural Celebration of Women Award

Achieving My Purpose, LLC

2019 Inaugural It Takes a Village Award

Maricopa County Branch of the NAACP

It's a Family Affair



Celebrating 40 years of marriage to Michael Echols



Aunt to
Soror Stephanie Anderson
Xi Tau Omega Chapter
Grandview, Missouri



Godmother to
Soror Joi Fletcher
Delta Beta Omega Chapter
Phoenix, Arizona



With Soror Camilla Westenberg
and their mothers Bertha
Anderson and Alice Hester

Soror Tonette's Personal Passions



TRAVEL

Tonette has visited nearly every state in the U.S. and many of the world's most amazing international cities.



THE HOLIDAYS

Every holiday season, Tonette looks forward to displaying her large and eclectic collection of 439 ornaments on the "very best Christmas tree ever!"



PRO FOOTBALL

Tonette is an Arizona Cardinals season ticketholder and lifelong Kansas City Chiefs fan!

Tonette M. Echols, CFP®

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