

Business Name: AGA Tax and Consulting Services LLC

Owner(s) Name: Alex Davis

Business Location: Bradenton, FL

Website: www.agataxservices.com

Year Your Business Was Founded: 2019



Tell us about yourself and your background.

I'm Alex Davis, a Sarasota native, CPA, and CERTIFIED FINANCIAL PLANNER™, and the founder of AGA Tax & Consulting Services. I spent a decade in public accounting at a prestigious firm before stepping out on my own to build something that felt more aligned with who I am and the life I wanted to create for myself, my family, and my community. I defied the odds as a single teen mom to become part of the less than 0.5% of Black women who hold both the CPA and CFP® designations — but what I'm most proud of is being a mom on a mission to break the generational patterns that have impacted my community for far too long. That purpose is at the center of everything I do.

I'm a Goldman Sachs One Million Black Women in Business alumna, a 2025 SRQ Magazine Women to Watch honoree, a 2024 Sarasota Chamber Moniroty Business of the Year finalist, and a two-time bestselling author. I'm also a proud University of South Florida graduate — Go Bulls, Sarasota/Manatee campus specifically. Beyond the credentials, I'm a mom to two daughters, a speaker, and someone who is deeply rooted in and committed to this community.

What inspired you to start your business?

The first was deeply personal. Public accounting is grueling, and as a single mom of two, I needed more control over my time and my life. I had gained so much knowledge working at a prestigious firm and I wanted to bring that expertise directly to small business owners, but on my own terms.

My business has transformed significantly since I founded it, and that transformation was inspired by something I couldn't have anticipated: my own healing journey as an entrepreneur, and the patterns I kept witnessing in the women I worked with. So many of them are incredibly talented — brilliant at what they do — but they're missing a financial foundation that goes beyond tax returns and budgets. And even deeper than that, there are patterns, behaviors, and beliefs that are quietly driving their financial decisions in ways they don't always recognize.

I realized that the inner work is just as critical as the strategy. That realization is what truly transformed my business into what it is today. Supporting the whole woman, not just the numbers.

What problem does your business solve for customers?

At the heart of what I do, I help women entrepreneurs get clarity around their finances so they can build wealth that is sustainable and that actually feels good. Not just wealth on paper, but wealth that aligns with who they are and the life they want.

I offer a range of services to meet clients where they are: one-on-one VIP Day intensives, mentorship packages, group programs, workshops, retreats, and digital financial education courses for those who prefer to learn on their own schedule. I also work with nonprofits to extend financial education to women who may not be able to access one-on-one support.

This work is bigger than business for me. It's a movement. Women are the heartbeat of families. When more women are making healthy, empowered financial decisions, the entire community benefits. They have more time, more bandwidth, and more resources to give back, without sacrificing themselves in the process. That ripple effect is why this work matters so deeply to me.

How does your business support or impact the local community?

Giving back to the local community through education is something I'm passionate about. I speak at events, partner with nonprofits to develop programming for the next generation of women, and make sure that financial literacy and empowerment are accessible, not just for those who can afford premium services.

Why is being part of the local business community important to you?

Being part of the local business community matters to me because I am this community. I grew up here. I'm raising my daughters here. Sarasota is home, and when I show up in this community, I'm not just building a business. I'm pouring back into the place that shaped me.

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How has the Sarasota Chamber-OFA and ThinkBIG supported your business journey?

ThinkBIG and OFA have been instrumental in getting me in front of business owners and resources I simply wouldn't have found on my own.

One of the most meaningful examples is the Sarasota Leadership Program. I'm not sure I ever would have pursued it had it not been for my involvement with OFA and a family member who went through the program and couldn't say enough great things about it. I'm graduating in May, and I can honestly say I cannot imagine not having had that experience. It has deepened my love for this community and connected me with business leaders who genuinely care about Sarasota. We always say your network is your net worth, and that has never been more true than in what I've gained through ThinkBIG. The connections, the resources, the awareness of what's available in this community — all of it has allowed me to serve my clients at a higher level and show up more fully as a business owner.

What opportunities or goals are you hoping to achieve through ThinkBIG?

My biggest goal is to use the platform and connections ThinkBIG offers to share my message with more women and ultimately host a large-scale conference right here in the Sarasota area.

The work I do is rooted in a proprietary framework I call the Liberated Wealth Method™, and it operates across three pillars. The first is Wealth Infrastructure, which covers the traditional strategies, systems, and financial tools needed to build wealth. The second is Wealth Identity, which examines the beliefs, patterns, and habits that shape how we show up in relationship to money. The third is Wealth Safety, which is about understanding how our nervous system responds to financial goals and learning to make decisions from a place of regulation rather than fear, scarcity, or past trauma.

This three-pronged approach is rare. Most financial conversations stop at infrastructure. But the truth is, you can have the best wealth plan in the world and still feel like something is always derailing you, because if you don't feel safe, nothing sticks.

My mission through ThinkBIG is to get in front of more women, share this message, and eventually create a signature conference that brings women from across the country to Sarasota to do real, transformative work around wealth, wellness, and what it truly means to thrive.