

# We support your **independence**, so you can scale your practice and help elevate your **clients' experiences**

When you work with us, you get control and confidence — without significant tradeoffs. That means freedom and flexibility to build your own practice with all the benefits of being part of an established firm.



## Layers of local and home office support



### Your Market Leader

Works closely with you to plan your growth, to serve as a trusted sounding board and to connect you to resources.



### Your local team

Includes dedicated experts and operational support to help you with technology, marketing and compliance.



### Equitable Advisors national infrastructure

Includes in-house specialists who can support you on topics like advanced markets and tax strategies, practice development, real estate, succession planning and onboarding.

## Your Market Leader helps you power the growth of your practice and your personal development

### Develop a growth plan

Your Market Leader works with you to understand your practice and your goals, so together you can chart a purposeful plan to help achieve them.

### Work with a collaborative network

With regular check-ins, especially during your onboarding period, your Market Leader is there to offer guidance as a successful advisor who's been in your shoes.

### Get connected to valuable resources

Whether it's entering new markets, teaming, succession or development opportunities, your Market Leader is your personal link to the wider Equitable Advisors ecosystem.



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## Your local team gives you on-the-ground support, so you can focus on your clients

### Save time with vetted and packaged digital tools, led by a specialist

No need to seek out and manage individual tools; we do it for you – with the benefit of subscriptions at scale. We've strategically built a digital ecosystem that integrates key tools to reduce data entry, eliminate duplication and simplify administration with straight-through processing. When issues arise, you can talk to local tech support.

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### Collaborate on a marketing plan

Our in-house marketing team helps you develop strategic marketing plans that you can customize to fit your business.

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### Work with a compliance team that understands you

Our compliance teams help you manage risk and protect and educate you and your team to comply with company and industry standards.

## National infrastructure takes your practice to the next level

### Work with in-house specialists for clients' more sophisticated needs

Collaborate with tax, wealth transfer and advanced markets experts who specialize in case design to help you build actionable strategies.

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### Advance with development opportunities to expand your practice and enter new markets

- **Share and learn from peers.** Access one-on-one coaching and peer advisor networking opportunities. Top-producing advisors can participate in elite programs, such as the Elite Advisor Group and Equitable Gold, which offer their own peer best-practice groups, as well as other benefits in compensation and support.
  - **Elevate your team.** In-house workshops on sophisticated client-planning strategies, marketing and digital training can help your team and your practice.
  - **Gain access to valuable new credentials.** We offer additional professional development opportunities, like Wharton business school's Certificate in Retirement Planning or the Holistic Financial Coaching Program, designed in partnership with Columbia University.
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### Find real estate

Take advantage of 80 Equitable Advisors' offices nationwide, as well as individual or team office spaces you can utilize for one-off client meetings or permanent working space. You can work with a team to make managing office space easier.

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### Seamlessly move your practice with a dedicated transition team

With a proven process after helping hundreds of advisors like you, we work to understand you and your business, then build a personalized plan and put it to action. We handle the heavy lifting, so you can focus on your clients.

## Build and plan for the future

### Add capabilities and capacity through teaming

Whether you're joining a team with established advisor(s), aspiring to build one or bringing your team onboard.

### Leverage our farm team

With Equitable Advisors commitment to bringing new talent to the industry, there is an opportunity as a seasoned advisor to scout and fully train new talent to help grow your practice.

### Go to market the way you want

You can choose to operate under your own DBA, co-brand or fully leverage the Equitable Advisors brand.

### Benefit from your business — or expand faster — with a succession plan

Collaborate with your Market Leader to either buy or sell a book of business. Our succession-planning department helps connect you to top resources in the industry, such as:

- Succession Resource Group, an industry leader in valuation, contingency planning and personalized succession
- Live Oak Bank, the largest SBA 7(a) lender in the United States by dollar volume

**Supported independence means you're in control but not alone.  
You can continue building the business you envision  
with the right kind of support to get you there.**

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