A team of onboarding specialists to help you **transition with confidence**

We work with you to plan, prepare and execute, so you can make your move as smoothly as possible — and, ultimately, we support your efforts in continuing to serve your clients.

Move forward with a proven, personalized process

Work closely with a dedicated transition team

Your Transition Manager takes time to get to know you; they'll feel like an extension of your practice. Their sole focus is to ensure your move is a successful one. Your local Market Leader, a critical part of this support, continues to work with you long after, staying accountable for delivering on their commitments to you.

Create a detailed transition plan and timeline

Your Transition Manager and local Market Leader collaborate with you on a detailed plan that accounts for what's unique about your practice and clients. You'll continue to have regular scheduled calls with the transition team to stay on track with your transition plan as they move you through each step.

6–8 weeks/pretransfer

Move you

We start focusing on the logistics of setting you up to work with us:

- Background checks, offer letters
- Registration/licensing, paperwork and onboarding prep

4 weeks–first 30 days

Move infrastructure

Digital experts make sure your tech experience is integrated and ready to go live:

- Devices — laptops, phones
- CRM tools/data migration
- DBA setup
- Website and digital presence

Day 1–day 180

Move clients

Your local Market Leader and Transition Manager help you strategize the sequencing of client transfers:

- Identify your most complex clients and discuss the best approach to and timing for their transitions
- Prioritize which clients to move first, so you can use them as success stories

Our client transfer specialists work to ensure the proper paperwork is prepped and completed for clients:

- Due diligence — advisory, brokerage, annuity
- ACAT/client transfer forms identified and prepopulated to streamline the process

Day 1–many years to come

Move forward

Your practice is up and running with support from our team and ongoing guidance from your local Market Leader.

EQUITABLE ADVISORS

We handle the heavy lifting, so you can focus on your clients

Save time and paperwork headaches

We take stock of your clients' portfolios and move their assets. Our team of client transfer specialists streamline the process by populating applications and client transfer forms for you. In fact, Equitable Advisors is one of the few firms that does not require client statements to transfer your clients' accounts. And unlike most other firms, Equitable Advisors will cover your ACAT transfer fees for you during your transition.

Get hands-on support for each client's unique case

Work closely with your local Market Leader and our client transfer specialists for advice on moving your most complex clients. Together, you can strategize the sequencing of each client's transition to increase the likelihood of success with your high-priority clients.

Get consulting and collateral for critical communications

We provide templates and personal coaching for how to effectively communicate your move to your clients.

Making a change is always hard work. But it isn't the first time we've helped an advisor like you. Our dedicated transition team has expertise developed by helping hundreds of advisors who have gone through the process.

EQUITABLE
ADVISORS