



Benefits of working with a financial advisor

Results of Equitable's Value of the Advisor Study

Financial outcomes – higher balances and more confidence

Worked with a financial professional

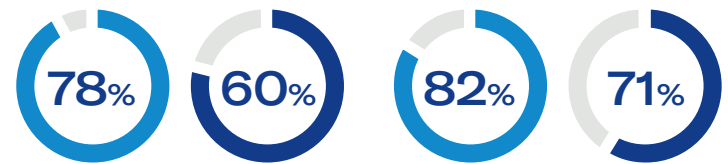


Those who worked with a financial professional are more confident in meeting retirement goals and leaving something to their heirs than those who did not.

Confidence in meeting retirement goals

Confidence heirs will receive a payout

Did **not** work with a financial professional



- **Worked** with a financial professional
- **Did not** work with a financial professional

Investing behaviors – contribute more and earlier

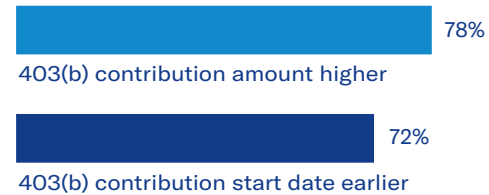
Worked with a financial professional



Those who worked with a financial professional increased their contributions 43% more frequently than those who did not.

Because of my financial professional (% agree)...

Did **not** work with a financial professional

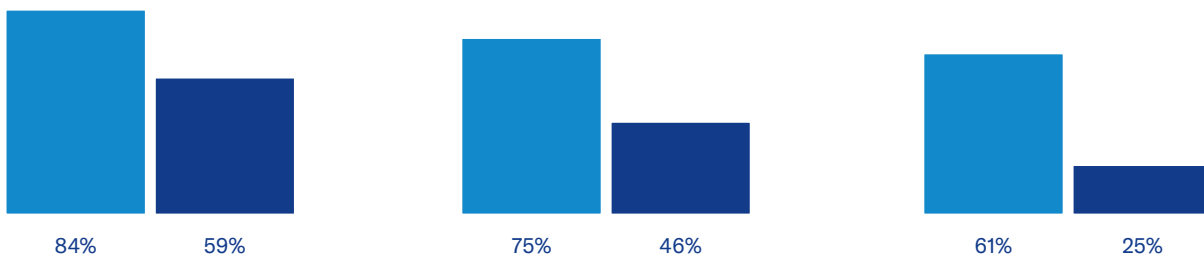


Emotional benefits – greater satisfaction

Satisfaction with 403(b) plan

Satisfaction with plan performance

Knowledge about investment choices



- **Worked** with a financial professional
- **Did not** work with a financial professional

For more information, visit equitable.com.

Source: Equitable Value of the Advisor Study, 2022.

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