



EQUITABLE

Advanced Markets

Meet the team

Our industry-respected Advanced Markets experts are a team of attorneys and case design specialists dedicated to providing diverse strategic case alternatives in the areas of business, estate, retirement, wealth accumulation and distribution planning.

Together, they have years of collective experience working with professionals and clients at some of the country's leading financial planning and legal firms. They are committed to providing custom advice, actionable strategies and proven results to help meet your needs and those of your clients.

Call us today
(860) 409-1290

OR

Send us an email >

EquitableAdvancedMarkets@equitable.com

Thought Leadership and case consultation



Stephen Coskran

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Specializing in estate and legacy planning, executive benefits and business succession planning, as well as charitable, long-term care and special needs trust planning.



Michael Geeraerts

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Michael has written numerous articles for national publications and delivered trainings to advisors, CPAs and attorneys on various topics.

Specializing in business planning strategies, executive benefits, charitable planning, wealth transfer and estate planning.



Mike Chan

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Mike helps deliver top-tier Advanced Markets case design support to our distribution partners, as well as our sales team.

Specializing in distribution and business planning strategies, like guaranteed issue, split-dollar and executive benefit plans.

Topics of expertise

Business planning strategies

Buy-Sell Planning
Business Valuation
Key Person Protection

Charitable planning

Charitable Owned Policy Review
Charitable Lead Trusts
Charitable Remainder Trusts
Direct Gifts and Bequests

Wealth transfer and estate planning

Life Insurance as an Asset/
IRR Designs
Concentrated Stock and
Life Insurance
Credit Shelter Trusts
Generation-Skipping Transfers
Grantor Retained Annuity Trusts
Irrevocable Life Insurance Trusts
Lifetime and Testamentary Transfers
Qualified Personal
Residence Trusts

Executive benefits

Executive Bonus Plans
Deferred Compensation
Bonus and Tax Loan Plans
Split-Dollar Plans

Life insurance funding

Premium Financing
Retirement Distribution
Planning/Qualified Plan
Distribution Analysis
Social Security Max
Life in a Qualified Plan

Supplemental income and accumulation planning strategies

Roth IRA Alternatives
Smooth Sailing
Private Reserve
Social Security Bridge

Policy review

Policy Purpose Health
Change Review
Title and Beneficiary Review
1035 and Term Conversion Issues

Specialized expertise	Expert thinking	Proven results
<ul style="list-style-type: none"> • A dedicated team of industry leaders and expert specialists • Responsive, approachable and professional team 	<ul style="list-style-type: none"> • On-demand case consultation • Collaboration on cases to get effective results 	<ul style="list-style-type: none"> • Actionable strategies that bring your clients' goals to life • Support to help ensure our strategies can be implemented
<ul style="list-style-type: none"> • Our experienced team is full of industry leaders who specialize in the Advanced Markets space • We work together with our Specialty Markets team as expert specialists who have deep experience in the complex legal and tax intricacies of life insurance case design • We work personally with you because we believe relationships matter • We're continually investing in our team to make sure we always have the expert talent and specialists to support you 	<ul style="list-style-type: none"> • We work with you to help solve complex client challenges and meet their needs with often simple, yet powerful strategies • Our experts develop innovative, effective strategies • Our thoughtful and thorough advice is always custom-designed for your clients' unique needs • We also offer 24/7 access to a robust online library of information, so you can get the help you need on your terms 	<ul style="list-style-type: none"> • We create pragmatic, time-tested approaches that can translate into tangible results • That means your clients can potentially minimize taxes, pass on wealth or compensate their employees • Our team works seamlessly across our organization to help drive the case from beginning to end • Proven results for your clients helps build your relationships and book of business

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