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 over 325 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
ChFC®, CLU®, NQPC™, CLTC®, CEPA®
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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
CPA, JD, CLU®, NQPC
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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.

Tom Enders
ChFC®, CLU®
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Tom has served in various roles as a member of the Advanced Markets and Proposal Development teams.

Specializing in case consultation on individual planning, executive benefits and succession planning, and also provides legacy product support.

Tom McGlynn
CLU®
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Tom provides client-centered strategic analysis and advanced planning recommendations achieving maximum financial benefits. Extensive experience as an advisor, product manager, regional director and head of Advanced Markets.

Expertise includes product knowledge, estate, business and executive benefit designs.

Expert case design

Bruce Guillemette
MSM, ChFC®, CLU®, FLMI, NQPC
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Bruce leads the Advanced Markets Case Design team.

Specializing in case design, the use of life insurance in business insurance, executive benefits, guaranteed issue, estate planning situations, business planning and wealth transfer strategies.

Pete Cyr
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Pete provides sales consultations and Advanced Markets case design support to financial professionals, as well as our sales team.

Specializing in qualified plan design, distribution, estate and business planning, premium financing and charitable planning.

Hunter White
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Hunter provides solutions, and case design support to our distribution partners and sales teams.

Specializing in estate and business planning strategies, such as guaranteed issue, split-dollar and executive benefit plans.

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, such as guaranteed issue, split-dollar and executive benefit plans.

Katy Duncan
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Katy has experience in case design consultation.

Specializing in case design, positioning of life insurance for business planning, executive benefits, guaranteed issue and estate planning.

How can we help?

With a solid foundation of specialized expertise, expert thinking and proven results, our **Advanced Markets experts** are constantly seeking new ways to better meet your needs and those of your clients.

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EquitableAdvancedMarkets@equitable.com

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
• A dedicated team of industry leaders and expert specialists • Responsive, approachable and professional team	• On-demand case consultation • Collaboration on cases to get effective results	• Actionable strategies that bring your clients' goals to life • Support to help ensure our strategies can be implemented
• 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	• 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	• 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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