EQUITABLE ADVISORS

AN EXPERIENCED ADVISOR SUCCESS STORY

Why my practice belongs at **Equitable Advisors**

Transforming my financial advisory business: Offering comprehensive financial planning and business growth opportunities

"I wanted to be with a firm where I felt like a contributor, not just a number, and had the support of people who would help me accomplish my goals." — Neil

As an accomplished financial advisor, Neil had a successful record of helping clients achieve their financial goals. However, he wanted to offer his clients even more comprehensive and tailored planning strategies. In addition, he was looking for an opportunity to scale his practice the way he wanted so he could better serve a larger client base. Here's why he decided to transition to a new broker-dealer: Equitable Advisors, LLC.

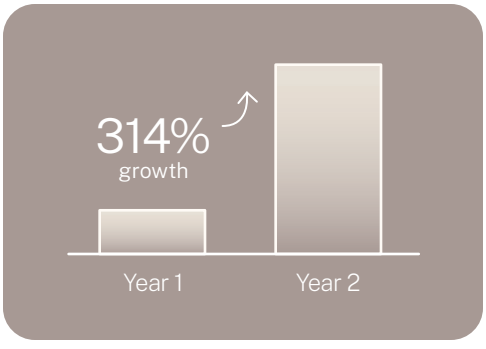


Meet
Neil Eggers

18 years in the business

Joined Equitable Advisors in November 2022

DBA Family Legacy Wealth Solutions in Birmingham, Alabama



The results speak volumes about Neil's transformative journey.

Last year, the team witnessed an astounding 314% year-over-year growth. This meteoric rise can be attributed to the strategic shift in focus, the integration of innovative COIL products and the collaborative efforts within the high-performing advisor team.

Looking ahead, Neil has set an aspirational goal of achieving a remarkable 263% growth this year, fueled by continued teamwork and an unwavering commitment to elevating expertise.

What made Neil consider leaving his previous firm?

1. Compensation structure that didn't value a wide variety of products and services in a client's wealth plan and left him with the sole responsibility for his business expenses.
2. Platform didn't integrate all aspects of a wealth plan, making it difficult to plan holistically.
3. Inflexible, non-entrepreneurial culture that discouraged him from looking for additional opportunities to grow his practice, such as not allowing him to add his CPA designation to his business card so he could access new center of influences.

"A client of mine is in the C-suite of a world-class company. When he retired, he had a significant amount of net worth. He trusted me to help him with his estate planning and, because I had access to Equitable Advisors' open architecture platform and a wide variety of products and services, I was able to create a comprehensive estate plan for him that included products like Corporate Owned Life Insurance — a tax-deferred opportunity for him to grow and transfer his wealth. The open architecture platform is helping me grow my practice too." — Neil

Why Equitable Advisors?

Entrepreneurial culture

"Equitable Advisors gives me the flexibility to build my practice the way I want. With multiple layers of support, I can stay away from non-revenue-generating activity and focus on my clients. I'm able to work with specialists for specific cases and create a team of professionals who have a variety of experience in focus areas."

Supported independence

"With the admin support I receive, my cost of doing business decreased and my revenue increased. I am able to further narrow my focus to niche and target markets and expand my practice through centers of influence. I am a member of the Alabama Society of CPAs and The Estate Planning Council of Birmingham. Being able to spend my time and efforts in these areas is helping me grow my practice and create relationships in business. It's already generating a significant amount of business where I couldn't before."

Holistic planning philosophy and the platform to back it up

"I knew Equitable Advisors was strong in their protection products, but I didn't realize just how deep their reach was in all types of financial products and services. With their open architecture platform, I can truly offer holistic planning for my clients."

Opportunity to be part of a team of high-performing financial advisors

"Having been by myself for a while, it's nice to join a group of successful people who have experience in different areas. I joined a group that includes an experienced professional in estate planning strategies, and this has opened a lot of doors for me. I have high-net-worth clients who need in-depth estate planning. Now, as part of a team, I provide those strategies also."

To learn more, contact us at **equitableadvisors@equitable.com.**

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