EQUITABLE ADVISORS

AN EXPERIENCED ADVISOR SUCCESS STORY

Why I brought my practice to **Equitable Advisors**

Supported independence:

Offering holistic financial and estate planning strategies and business growth opportunities

"I like that Equitable Advisors offers supported independence and has the reputation and resources me, my team, and my clients need to prosper." — Lori

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As an experienced financial advisor with 28 years in the business, Lori Brown built her practice by delivering comprehensive advice and helping her clients achieve their financial goals. However, she wanted to grow her practice by focusing on specific centers of influence and needed support to better serve a larger client base. Here's why, when her partner approached her about moving to another broker-dealer, she decided the best choice was Equitable Advisors, LLC.



Meet
Lori Brown

- 28 years in the business
- Joined Equitable Advisors in May 2024
- DBA Star City Private Wealth

In her first years at Equitable Advisors

- brought 83% of her book to Equitable Advisors — a big number coming from a bank brokerage channel.

Lori sees a bright future for herself and her team at Equitable Advisors.

While Lori and her team are focused on transitioning clients, she is also planning events, moving into a new building and meeting with centers of influence to grow her practice her way. She is excited about the future and the opportunities available to her since joining Equitable Advisors.

What made Lori consider leaving her previous firm?

1. Independence and support she received was not consistent to be able to best service her clients. Bureaucracy often got in the way of her goals.
2. Technology didn't allow her to provide streamlined, comprehensive financial planning for her clients.
3. Inflexible culture didn't allow her to grow her business her way and build the succession plan she envisioned with her daughter.

> "I brought my daughter into the business a few years ago as my succession plan, but she didn't have a specific path. With the opportunities here, she's very excited that she's going to be able to move faster, and she's got a bright future."
>
> — Lori

Why Equitable Advisors?

Supported independence

"I came from a bank brokerage, so my clients wanted to know who is supporting me, supporting my brand. With Equitable Advisors, I now have the local layers of support and the resources I need to provide the service my clients deserve."

Growth her way

"With the support we get from Equitable Advisors, we have an opportunity to grow the way we want. We're working with centers of influence who are committed to referring business to us."

Innovative technology

"I now have access to robust technology to help me better serve my clients."

Mentorships

"In my daughter's role at our previous firm, she would have been in that position for 10 years before having an opportunity to move up. Now, she is in the mentorship program and is excited about the opportunities for advancement."

Giving back

"It may sound trivial, but Equitable Advisors matches my contribution to charities like the American Heart Association. That's important to me because it's a passion of mine."

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

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