

Why Equitable Advisors is the only firm for my practice

An experienced advisor success story



The benefits of supported independence

Equitable Advisors provides the resources needed to build the team you want

As an **experienced financial advisor** with 25 years' experience, Bill Manchester believes in growth. He looks for new ways to grow his own skills and his practice — as well as the industry in general — by helping young advisors develop their talents and offering them opportunities to advance. However, he struggled to do both at his prior firm and wanted the support of a company with the resources and guiding principles that aligned with his own. That's why, when he was approached about moving his practice to Equitable Advisors, LLC, he knew it was the right thing to do.

What made Bill consider leaving his previous firm?

- 1 As a lifetime learner and mentor, Bill felt stagnant. He didn't have the practice development — for himself or the junior advisors on his team.
- 2 The independence and support he received wasn't consistent with what he or his clients needed. He felt alone and on his own.
- 3 There were difficulties in connecting with senior leaders, which hindered his ability to gain valuable insights and mentorship essential for building a firm.

Meet Bill Manchester

- 25 years in the business
- The Manchester Group of Firsttrust Financial Resources
- Joined Equitable Advisors in 2021



As a mentor, **I now have the infrastructure I need** to handle the things that would typically be a challenge or a roadblock to bringing people into the business.

My son will be joining our team in the future, giving him an **incredible opportunity to grow** as a person and an advisor. It's a huge advantage for him to start out at a great firm like this."



I love that it's my own business, but I have **the resources I need to grow**, and I'm tied to a great name like Equitable Advisors."



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Why Equitable Advisors?

When Bill was approached about moving his practice to Equitable Advisors, he knew right away it would be a good fit. **Here's why:**



Supported independence — “I’ve always wanted to be part of an organization — something bigger than myself — and I have potential to attract more business, but needed the support to bring it all together. I got that with Equitable Advisors.”



Teaming culture — “I knew right away that Equitable Advisors was the place for me because they really emphasize teamwork, people and the support to get it done.”



Practice development for Bill and his staff — “Having opportunities to learn best practices — that’s huge for me as a more mature advisor and for the younger people on my team. I’ve never had that before.”

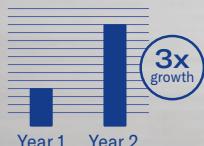


Innovative technology — “I feel like a kid in a candy store here, with all the different resources and advanced technology available to me.”



Resources and people who can help — “My business has taken off since being here. It was a matter of tweaking a couple things, learning different strategies and brainstorming with specialists.”

Bill sees a prosperous future for himself and his team at Equitable Advisors.



His firm’s revenue tripled in just 2 years, and he looks forward to continuing its growth.

At Equitable Advisors, Bill finally feels like he is part of something bigger — a real team. And the best part is, he did it without giving up his core principles, his identity and his ability to market.

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

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