

Why Equitable Advisors was the right place to grow my practice

Experienced advisors success story

Supported independence:

The freedom and flexibility to build our practice our way, supported by the benefits of an established firm.

As an experienced financial advisor with **38 years in the business**, Tammi Kukainis followed in her father's footsteps, joined the family practice and brought her son, Dan, into the business. With a focus on serving their clients to the highest standards, Tammi and Dan found that they needed additional manpower and support, but didn't have the time to locate, hire and train new advisors on their own. This was just one of the reasons they considered moving to a new broker-dealer and ultimately chose **Equitable Advisors, LLC**.

What made Tammi and Dan consider leaving their previous firm?

- 1 Former broker-dealer did not offer the breadth and depth of new advisor and product specialists they could work with to grow their practice and put a succession plan in place.
- 2 Needed a firm they felt was more culturally aligned with their own goals and beliefs.
- 3 They wanted to feel fully independent, but with support from an established firm.

“

I was with my previous firm for many years and had no intention to leave. But when Dan joined 9 years ago, we were trying to come up with a succession or transition plan over time. For this, we needed more people: qualified, intelligent ones who fit our culture. We found them through Equitable Advisors.” – Tammi



Meet Tammi and Dan Kukainis

- 38 years in the business
- DBA Schwartz Financial Associates
- Joined Equitable Advisors in September 2023

“

By **not** having to go through the process of searching and vetting staff on our own, we **save so much time** and are **able to focus** on giving our clients the best possible service.” – Dan



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Why Equitable Advisors?



Supported independence — “It’s increasingly difficult in this industry to be a lone wolf, especially for a smaller practice. Joining Equitable Advisors allowed us to maintain our independence, but with operational support and technology that takes some of the minutia off our plate.”



Access to junior advisors and product specialists — “We are finally able to grow and build our practice the way we want and put a succession plan in place, with access to advisors who align with our values.”



Emphasis on continuous learning — “We love that Equitable Advisors offers a rich pool of local and national layers of support and resources to help advisors of all levels strengthen their skills and gain new credentials complemented by local coaching and relationships you can count on.”



Cultural alignment — “Equitable Advisors emphasizes bringing in women and offering professional education to help lift them up. That’s a value system that closely aligns with ours.”

Tammi and Dan are excited to continue growing their practice with Equitable Advisors.

In the 2 years since joining Equitable Advisors, Tammi and Dan have:

- ✓ grown their advisory assets by **20%**
- ✓ brought over **90%** of their managed accounts in **less than 90 days**
- ✓ **reduced expenses** by leveraging shared office space

Tammi and Dan have not only transitioned their practice, but moved into a new building and started utilizing many of Equitable’s annuities to help protect and grow their clients’ retirement portfolios.* They are also looking to continue growing their group of advisors to better serve their clients.

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

Tamara Kukainis — CA insurance lic. #1366047

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