EQUITABLE ADVISORS

AN EXPERIENCED ADVISOR SUCCESS STORY

Why **Equitable Advisors** was the right place to grow our practice

Supported independence

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

"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

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 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.



Meet
Tammi and Dan Kukainis

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

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**
- seen **double-digit growth** for most of their clients

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

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.[1] They are also looking to continue growing their group of advisors to better serve their clients.

What made Tammi and Dan consider leaving their previous firm?

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.

Needed a firm they felt was more culturally aligned with their own goals and beliefs.

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 7 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

Why Equitable Advisors?

True supported independence model

"After years of building a territory just to have it taken away and being told I could be independent only to find out I couldn't, Equitable Advisors' supported independence model provided me with the freedom and flexibility to build my practice my way, with the backing and resources of an established firm."

Freedom to build and brand her own practice

"The marketing environment here is unlike anything I've seen. It allows me to highlight my own brand and my own logo in alliance with Equitable Advisors."

Cultural alignment

"With Equitable Advisors, I have access to a vast variety of professionals that I need to work with. People here actually show up, collaborate and help each other. I don't even know if there's a word for how unique that is."

Long-term succession support

"Legacy planning and succession planning are very, very important to me, and I wanted to choose my model, not have it chosen for me."

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

Tamara Kukainis — CA insurance lic. #1366047

1 Equitable refers to Equitable Financial Life Insurance Company (Equitable Financial) (NY, NY) and Equitable Financial Life Insurance Company of America (Equitable America), an AZ stock company with an administrative office located in Charlotte, NC, issuers of annuity and insurance products. Securities offered through Equitable Advisors, LLC (NY, NY (212) 314-4600), member FINRA, SIPC (Equitable Financial Advisors in MI & TN). Investment advisory products and services offered through Equitable Advisors, LLC, an SEC-registered investment adviser.

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