Language reference guide

This is a quick resource of compelling language to use when you speak or write about Equitable Advisors. Using this language consistently helps us build distinction and trust.

Our elevator story

Our brand promise

We are advisors who lead with insight and guide with empathy.

In a message

At Equitable Advisors, we're wealth management experts equipped to deliver meaningful advice for financial situations — from the straightforward to the complex — and, most importantly, yours.

But first, we get to know who you are — not just the numbers that factor into your financial decisions, but the values and life stories behind them. Together, we build a goals-based plan that reflects who you are, what you care about and what you're planning for.

Then we say, "Here's how," helping you put your plan into action with personalized financial advice and a wide range of best-in-class investment strategies.

And we stay with you as your life moves forward — working hard to keep your plan one step ahead to help you secure your financial well-being, keep it growing as life unfolds and protect what you've built.

Our holistic approach to planning

Your finances aren't separate from your real life — they're woven throughout it. Every decision you make about money touches something that matters: your home, your family, your work, your future. When we understand the relationship between your life and your money, we can help you plan for it all with:

Goals-based planning

First, we listen — to what matters most, where you've been, and where you're going. Then we build a strategy that reflects your story, your values and what you're planning for.

Personalized financial advice

The strategy is just the start. It's not about any single investment solution — it's about how we structure everything to deliver strong outcomes that work together for your real life and real what-ifs.

Ongoing review

As life changes — new chapters, new ventures, unexpected challenges — we work to keep your plan one step ahead. And we revisit the values behind them, so your plan always fits who you are and where you're headed.

Brand pillars our language supports

Integrity to win trust

Our priority is helping you grow your wealth and secure your financial well-being. We're the partner you can rely on, whatever comes next.

Insight to win confidence

We deliver meaningful advice through deep market knowledge and financial insight.

Equipped with a wide range of investment strategies from leading asset managers and backed by cutting-edge technology, we deliver solid financial advice, all in one place, to guide your full financial picture.

Empathy to build connection

We connect one-on-one to truly understand what matters most to you. We know your goals aren't always perfectly defined. That's why we meet you where you are, then look ahead.

You get the reach and resources of a market leader, delivered with the personal touch of an advisor who gets your future — and has your back.

Guidelines for when you need to say more

To talk about	Additional language to use	Why it works
Our planning process	☑ We ask the questions that confirm your values, reveal your worries, and identify your needs, even some you might not be thinking of. ☑ We see the story behind the numbers, and we plan with that story in mind.	Frames planning as a partnership that integrates the client's life and finances
What clients get in a comprehensive financial plan	☑ Together, we build a plan tailored to what matters most to you, your family, your business. ☑ But it's not about the plan on paper; it's about what that plan makes possible. So then we say, "Here's how." • Investment planning • Risk management • Retirement planning • Education planning • Income tax strategies • Estate and charitable planning strategies	Gives us a consistent set of terms to describe the core elements of our planning approach
Our full-service wealth management capabilities	☑ All decisions are connected. While it is important to address each goal individually, it's even more crucial to understand how they relate. ☑ Goals-based planning sits at the core of a comprehensive wealth-management approach, driving our ability to deliver solid financial advice, all in one place, to guide your full financial picture. ☑ We create tailored portfolios that adapt as life changes, ensuring your investments work together to help drive long-term success.	Reaffirms our approach to wealth management as a coordinated strategy that brings together all aspects of the client's financial life
Being part of Equitable Holdings	☑ Equitable Advisors is part of Equitable Holdings, one of America's premier, publicly-traded financial services companies. Together, we're on a mission to help people secure their financial well-being and pursue long and fulfilling lives.	Reinforces the value of being a part of EQH

Guidelines / Do say / Don't say

Guidelines	Do say	Don't say
Avoid outdated terms and abbreviations both internally and externally to maintain brand integrity, consistency and clarity	☑ Equitable Advisors, Equitable, Equitable Holdings ☑ Holistic approach ☑ Goals-based planning	⊗ EA, EQ, EQH ⊗ Holistic life planning or HLP ⊗ GBP
Follow branding and compliance rules governing our name	☑ As part of Equitable Advisors, I/we...	⊗ As your Equitable Advisor
Use wealth sparingly, as it can be off-putting; instead, use more neutral and plainspoken terms	☑ (Your) money, finances, financial, life stages	⊗ Your wealth
Keep insight and empathy balanced to be sure we sound like a leading wealth management firm, not a life coach	☑ We understand both the numbers that inform your financial decisions and the life stories behind them	⊗ Financial planning isn't just about money
Reference our tie to Equitable Holdings to build credibility, but be careful not to claim attributes for Equitable Advisors that don't apply	☑ Equitable Advisors is part of Equitable Holdings, one of America's premier, publicly-traded financial services companies	⊗ Our 165-year legacy
Avoid industry jargon	☑ Wide range of investment strategies to ensure objectivity and trust	⊗ Open architecture

EQUITABLE ADVISORS