



EQUITABLE
ADVISORS

Co-branding guidelines

May 2026

Co-branding overview

Co-branding your wealth management firm with Equitable Advisors enhances brand recognition, allows you to tap into more marketing resources and reduces the need to build brand awareness from scratch.

A curated approach

Firms electing to co-brand will be provided an official co-branded lockup of their logo. Partner firm logos are brought into a consistent colorway and format that is customized to seamlessly plug into all co-branded marketing assets.



Tap into the suite of co-branding opportunities today!

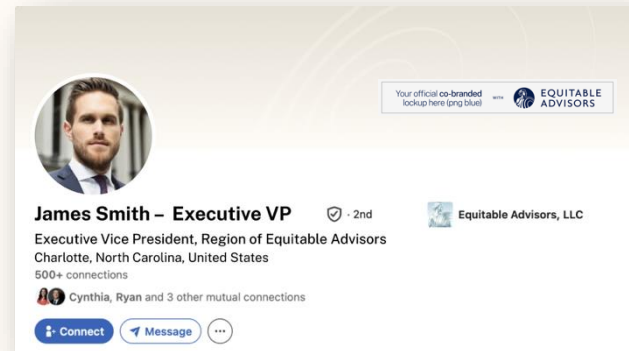
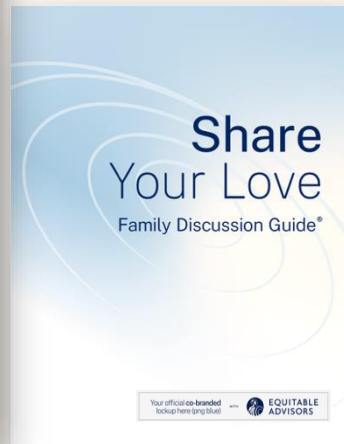
- Email wmmarketing@equitable.com
- Please provide a “vector” version of your firm’s logo (typically .eps or .ai format). If a vector version isn’t available, please send any available formats.
- Within 5-10 business days, you’ll receive a suite of co-branded logos sized and formatted to use in all available co-branded materials.
- For printed and digital collateral available via Storefront, you’ll find your logo available for use in the drop-down menu of co-branded collateral within 5-10 business days.

Where can you co-brand?

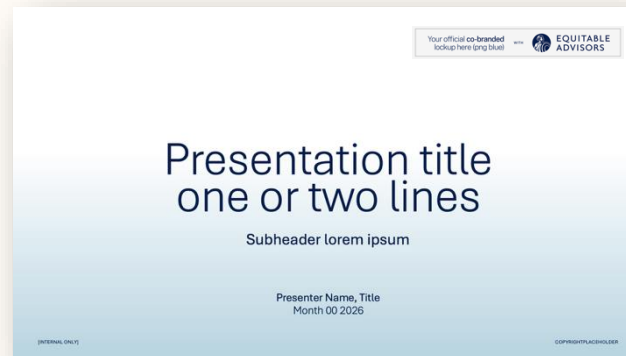
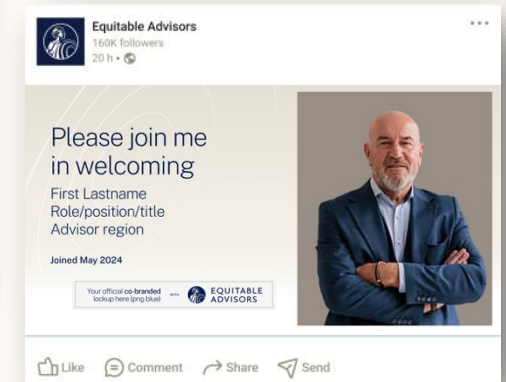
Below are examples of some, but not all, of the places you can leverage your official co-branded logo lockup.



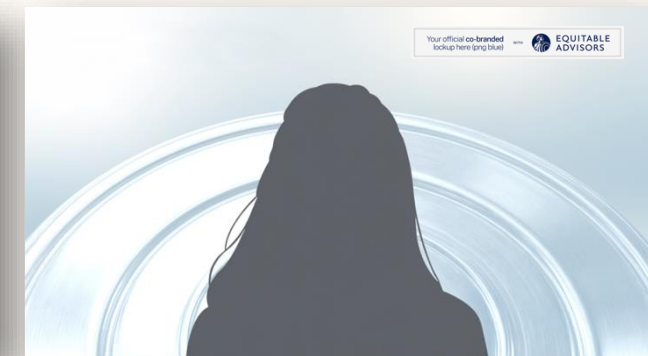
High-use, high-impact collateral for print or download (via Storefront/ToppanMerrill)



Social platform assets and social post templates (via Canva and deployed through EAMS)



Digital assets and templates (via Canva and Brand Hub)



Your co-branded logo on printed/digital collateral

- From the Advisor Portal go to “Order Marketing Materials”
- Search for “co-brand”
- Select your logo/firm name from drop-down
(If you’re not seeing your firm or you need to request an official co-brand lockup email wmmarketing@equitable.com)
- Select download or print

Note: Disclosure language is pre-approved, no compliance submission necessary.



Find self-serve co-branded assets

Multiple assets are available for customization with your official co-branded logo lock-up.

Canva templates:

Available via [Equitable Advisors Centralized Marketing Center](#) in Sharepoint

- Facebook and LinkedIn Mastheads
- Social post templates (for export and use on EAMS)
- Social profile assets (LinkedIn and Facebook cover images)
- Print/Digital ad templates (misc. sizes)
- Individual advisor bio flyer
- “People I Help” offerings flyer

Microsoft Office templates:

Available via [Equitable Advisors Brand Hub](#)

- Co-branded PPT template

Outlook signature template:

- EA Co-branded signature template

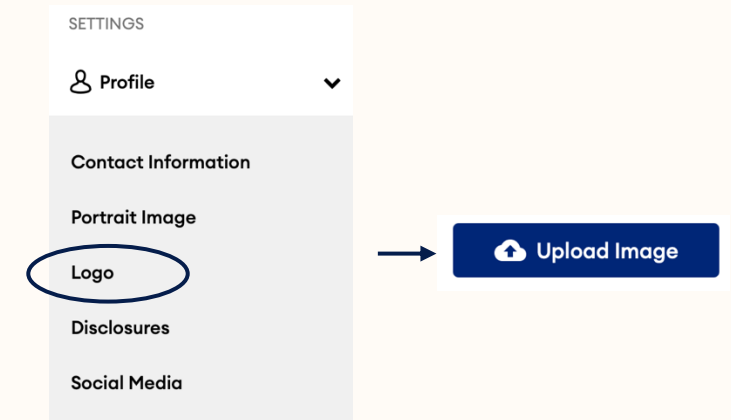
Word templates:

- Letterhead
- Memo
- Fax cover

Equitable Advisors Marketing Suite Emails/Social/Websites:

Add your official co-branded logo lockup to leverage EAMS co-branding.

- Navigate to the “Profile” area of your account.
- Select “Logo” then “Upload”.
- Navigate to the “PNG” version of your co-branded logo lockup and select it for upload.



Co-branding FAQs

Q: Can I create my own co-branded logo lockup?

A: To ensure brand consistency, advisors should not create their own co-branded lockups. Instead, please email Wmmarketing@equitable.com with a high-resolution version of your logo (vector format preferred). The team will provide a professionally created suite of approved co-branded logo files, typically within ~10 days, for use across approved templates.

Q: Can I add the new Equitable Advisors logo to my DBA-branded materials?

A: The official co-branded lockup may only be used within approved co-branded templates and marketing collateral. Adding the logo to independently created or existing DBA materials is not permitted. Requests for additional materials will be reviewed by the WM Marketing team in partnership with appropriate advisory committees.

Q: Can I recreate Equitable Advisors-branded materials in my DBA brand?

A: Advisors should not recreate or adapt Equitable Advisors-branded collateral into their own branding. Instead, we recommend using the approved co-branded templates and marketing materials, which are designed to maintain compliance and brand integrity.

Q: What if I need a new or updated firm logo?

A: If your firm logo needs to be refreshed for co-branding, the WM Marketing team can support you. When submitting your co-branding request to wmmarketing@equitable.com, indicate that you need logo updates and outline what changes are required. The team will provide guidance and next steps.

Q: Where can I use my co-branded materials?

A: Approved co-branded assets can be used across designated marketing channels and templates, including collateral available through official tools (such as StoreFront or approved digital template platforms).

Request your official co-branded logo lockup today!

To request your official co-branded logo lock-up begin by emailing the Wealth Management Marketing Team at wmmarketing@equitable.com.

- Please provide a “vector” version of your firm’s logo (typically .eps or .ai format). If a vector version isn’t available, please send any available formats.
- Within 5-10 business days you’ll receive a suite of co-branded logos sized and formatted to use in all available co-branded materials.
- For printed and digital collateral available via Storefront, you’ll find your logo available for use in the drop-down menu of co-branded collateral within 5-10 business days.



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