AN EXPERIENCED ADVISOR SUCCESS STORY

EQUITABLE ADVISORS

How **Equitable Advisors** helped me build a team to support business growth and client needs

Scaling with a team

Restructuring from an individual practice to a multi-generational team opens doors for long-term growth and exceptional service for more clients

"My story shows that you don't have to slow down late in your career if you work with Equitable Advisors. Instead, I restructured my practice and built a scalable firm designed for growth, acquisition, generational continuity and outstanding client service." — Howard



Meet
Howard Burke

30+ years as an advisor with Equitable Advisors

DBA Peach State Advisors
Cumming, Georgia

After over three decades as a successful advisor with an individual practice, Howard Burke found that he was spending too much time on administrative tasks instead of focusing on time with clients. Even though his baseline production remained strong, his growth was constrained by operational overload, creating inefficiencies and limiting his opportunities and his time in front of clients. That's when his Executive Vice President, Stephen Dunbar, saw an opportunity to provide guidance and resources.

In the first five years after transitioning to a team practice:

- business has grown by over 81%
- successfully acquired two books of business and is positioned to acquire additional practices
- Year-over-year growth is averaging more than 12% per year
- wealth and secure their financial well-being

Equitable Advisors provides every advisor with strategic leadership support

Stephen Dunbar, Howard's Executive Vice President and local leader, partnered with Howard to provide support and guidance:

1. Challenged Howard to step back from doing everything himself and encouraged a true team model.
2. Helped Howard recruit and bring experienced advisors onto his team to accelerate capacity and leverage, while providing exceptional service to a growing client base.
3. Assisted with deal flow and sourcing opportunities that positioned Howard's firm as an acquirer of other practices, not just an operator.
4. Acted as a strategic partner, providing space for Howard to pressure-test ideas, evaluate growth decisions and build his firm intentionally.

With Stephen's support and encouragement, Howard began intentionally delegating responsibilities outside his highest-value activities. He brought his son into the business and redesigned his practice around a deep, clearly defined team structure that included a chief of staff, dedicated marketing support, client service associates and callers, paraplanner and next-generation advisors that positioned his practice for long-term continuity and excellent client service.

How has Howard's practice changed?

Sustained and accelerated growth

"I've had sustained double-digit growth throughout my career and teaming has been a real catalyst to taking that growth to another level."

Quality of life transformation

"A talented assistant was a game-changer. She takes care of the details so I can focus on marketing, clients, and explaining complex recommendations."

Acquisition-ready business

"We've built something that's sustainable — not just for today, but for the next generation of advisors and clients."

A clear succession plan

"My son works with me full-time as a licensed advisor, and we've built this firm so it can continue well beyond me."

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

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G3766439 | Cat. #500103 (9/26)

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