AN EXPERIENCED ADVISOR SUCCESS STORY

EQUITABLE ADVISORS

How **Equitable Advisors** helped me redefine myself, from generalist to specialist

Growth through redirection

Focusing on a specialty brings renewed engagement, energy and practice success

"When I decided to redefine myself and my practice, Equitable Advisors was there to help. It was a shift that became a defining moment in my professional life." — Jan



Meet
Jan Williams

20+ years as an advisor with Equitable Advisors

DBA Family Legacy Wealth Solutions Management

After 20 years as an advisor with Equitable Advisors, Jan Williams had built deep experience as a generalist, serving a wide range of clients. But when he made a deliberate and courageous decision to redefine himself professionally and focus his entire practice on a specialty — wealth planning with an emphasis on reducing taxes — his business took off and he felt renewed energy and engagement.

How did strategic local leadership support help Jan?

Jan's Executive Vice President, Stephen Dunbar, believed that the specialty of wealth planning with tax-mitigation strategies was a good match to Jan's technical, detail-oriented and analytical strengths. That's because many of those types of cases were very large, highly complex and structurally sophisticated.

Jan is excited about the future

- has grown his business by over 136%
- had year-over-year average growth of 18.75%
- re-energized by the shift that's giving him more professional fulfillment than ever before

How did strategic local leadership support help Jan?

Jan's Executive Vice President, Stephen Dunbar, believed the specialty of multigenerational wealth planning with tax-efficient strategies was a good match to Jan's technical, detail-oriented and analytical strengths. That's because many of those types of cases were very large, highly complex and structurally sophisticated.

To support Jan's shift from generalist to specialist, Stephen:

1. **Connected Jan with a successful advisor whose business model he could learn from and adapt.** The mentorship gave Jan both a practical blueprint and the confidence to reshape his own practice.
2. **Aligned Jan's opportunities with his technical strengths and new specialty.** With Jan's engineering background, Stephen recognized that he would thrive in complex, detail-oriented wealth planning cases.
3. **Provided targeted leadership support through access, coaching and alignment.** Rather than directing Jan's next move, Stephen helped create the right conditions — mentorship, guidance and strategic exposure — for Jan to move his practice forward.
4. **Encouraged Jan to partner with next-generation advisors to create capacity for growth.** By building relationships with emerging talent, Jan was able to delegate select responsibilities, focus on higher-value planning work and spend more time serving clients within his specialty.

How has Jan's practice changed?

Deep alignment between strengths and strategy

"With a focus on wealth planning and tax planning, I've not only changed my practice but rebuilt my professional identity, including my website, email language, marketing collateral and client-facing messaging."

Clearly differentiated client experience

"My clients now benefit from deeper, more strategic conversations centered on legacy, tax efficiency and multigenerational wealth planning."

Commitment to teaming

"I am energized by mentoring and collaborating with next generation advisors, particularly those strong in client communication and execution. It's really transformed my business from a solo practice to an 'A-team' structure."

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

Jan Williams offers securities through Equitable Advisors, LLC (NY, NY (212) 314-4600), member FINRA, SIPC (Equitable Financial Advisors in MI & TN), offers investment advisory products and services through Equitable Advisors, LLC, an SEC-registered investment adviser, and offers annuity and insurance products through Equitable Network, LLC. Family Legacy Wealth Solutions is not owned or operated by Equitable Advisors or Equitable Network. Neither Equitable Advisors, LLC nor any of its representatives are in the business of giving tax or legal advice. Clients should consult with their own professional advisors to determine the appropriateness of any course of action.

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