



EQUITABLE
ADVISORS

Personal Financial Planning

Strategies to help us turn your financial dreams into realities

Consultative advice



Equitable Advisors focuses on a consultative relationship, so your specific needs can be better addressed.

Focus on your goals



To help you reach your goals, we start by outlining each of them considering your current situation.

Financial education



We help you sort through all the financial information and choices available, determining what is relevant to your needs.

Planning for each life stage



We strive to develop lifelong connections, adjusting your financial strategies when life events, the economic environment or legislative changes affect your situation.

Six primary areas of financial well-being

1. Financial Position
2. Risk Management
3. Retirement Planning
4. Investments
5. Income Taxes
6. Estate Planning & Wealth Preservation Strategies



All decisions are connected. So, while it is important to address each concern individually, it is even more crucial to assess how they interact. At Equitable Advisors, we can help you evaluate each of your goals in the context of one comprehensive, integrated strategy.



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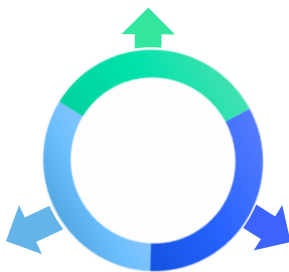


Equitable Advisors' Approach

Empowering you to make informed decisions

The planning process:

1. Discover your situation
2. Define your priorities
3. Analyze your data
4. Create a plan to help you meet your goals
5. Review the plan annually (if you choose)
6. Monitor progress toward goals



Planning strategies for:

- Asset allocation
- Education funding
- Retirement
- Retirement distribution
- Long-term care
- Disability income analysis
- Survivorship
- Estate planning
- Stock options
- Major purchase goals

Providing you with:

- Plan design
- Ongoing attention from your local Financial Professional

Did you know that as a SAANYS member, you are eligible to receive complimentary financial planning sessions for you and your family?

Email Kelly.DeMay@equitable.com and mention your SAANYS membership to be connected to your local financial professional.