EQUITABLE ADVISORS

People We Help Most Often

- ✓ **Retirees:** Help level to implement strategies to continue current lifestyle and minimize taxes, RMDs
- ✓ **Individuals 5-10 Years from Retirement:** Create goal-oriented plan to protect nest egg
- ✓ **Social Security:** Know When to Start Collecting
- ✓ **Job Changes:** Understand options for old 401(k) & help understand benefits offered by new employer
- ✓ **Newly Married:** Planning for financial goals together and protecting household
- ✓ **Growing Family:** Life insurance and college planning needs
- ✓ **Business Owners:** Set up retirement savings plan, business continuation & protection strategies
- ✓ **Pension Planning:** Understand how to maximize the benefits you are eligible to receive
- ✓ **Young Professionals:** Enroll in work benefits
- ✓ **Divorced or Widowed:** Review current situation to help ensure lifestyle remains the same

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