EQUITABLE

HALO

Fee-Only Insurance Solutions Simplified
with Equitable & Halo

Get Started:

- Contact a Halo Representative at (855) 744-4256 (HALO) to explore our advisory solutions and services.

Get Onboarded:

- Complete the RIA Onboarding Agreement to gain access to sales and service teams.
- Learn how Equitable's innovative products* can support your practice.

Get Going:

- Halo Insurance Services will help determine the best solutions for your clients and transact the sale.

Get Integrated:

- Integrated technology to meet you where you are.
- Equitable provides integrations with data aggregators and portfolio management software.
- Direct fee billing from the annuity is available.

IMPORTANT: Annuities are not suitable for all investors. All recommendations for annuity products must be suitable and appropriate for the client and must be based on a thorough fact finding and understanding of the client's unique financial situation, needs, goals and risk tolerance.

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