

Field Bulletin

October 3, 2024

FB 24-120 | For Financial Professional Use Only

*****This communication is an update to the previously communicated FB 23-135*****

Audience: Equitable Advisors Financial Professionals

Re: Website Program Updates in the Equitable Advisors Marketing Suite Platform

From: Wealth Management Marketing and Digital

What's new:

Highlights for 2024:

- The migration of existing Broadridge / Emerald websites to Equitable Advisors Marketing SuiteSM is complete.
- Beginning on January 1, 2025, monthly website maintenance fees previously covered by Equitable Home Office will transition back to website owners (applicable for former Broadridge website owners).
- Off-platform website owners are now eligible for migration to Marketing Suite (FMG)

When:

- Former Broadridge/Emerald website owners: Billing Transition Effective 1/1/25
- Off-platform website migrations: Available immediately

Action Required:

- Owners of websites that were migrated from Broadridge to Marketing Suite are required to provide their billing information with vendor before 12/31/24 to prevent interruption to website functionality.

For More Information:

- Please visit the [program microsite](#)
- If you have questions, contact advisormartech@equitable.com
- [Website Billing Transition FAQs](#)
- [Off-platform Website Migration Guide](#)

Overview

Program Policy

Effective immediately FMG (Marketing Suite) is the only approved vendor for FP website services. Due to the migration of all FP websites from Broadridge/Emerald to the Marketing Suite platform, Equitable Advisors has since sunset their relationship with our prior vendor.

Certain platform exceptions may be granted to FPs at the PPG level or higher with no significant disciplinary or complaint history. Reach out to your local complex chief controls officer for more information on off-platform website exceptions.

Broadridge/Emerald Websites – Migration to Marketing Suite + Billing Transition

As of July 1, 2024, website migrations from Broadridge to Marketing Suite (FMG) are now complete.

All website migration costs are currently covered by Equitable home office *including* website maintenance fees through the end of 2024. Ongoing website maintenance costs will be transferred back to website owners beginning on January 1, 2025. Monthly website maintenance fees are \$49/month and will include domain hosting for your first domain.

Any further domains being managed by FMG for your website will incur an additional fee of \$25 annually (~\$2/month), per domain.

For more information regarding the website billing transition, please review our [Website Billing Transition FAQs](#).

Off-Platform Websites

Off-platform website owners looking to move their website to Marketing Suite are now eligible to do so effective immediately. For more information on Marketing Suite's website platform capabilities, visit our [program microsite](#) and [request a demo](#).

For more information on the off-platform website migration process, review this [overview document](#).

➤ What are the benefits of moving a website to Marketing Suite?

Marketing Suite is a powerful all-in-one marketing technology platform for financial professionals as it provides an integrated marketing solution containing improved designs and content on an easy-to-use environment. Some of the added benefits you'll receive with Marketing Suite for websites are:

- One platform to manage all your marketing that will include your website, email and social media

- Web content (such as articles, e-books, quizzes, etc.) can be shared via email or social directly in platform, to help drive traffic to your website
- Increased web traffic helps improve Search Engine Optimization (SEO)
- A seamless experience for form fills to triggered emails
- Integration with Salesforce
- Availability of one-click compliance approvals

➤ **What are the impacts of staying with an approved outside website provider?**

If you have an approved outside website provider, you may continue to do so. However, please note the following important considerations:

- Web content or events shared via email or social media will drive to a branded landing page (not to off-platform websites).
- Branded landing pages will not help with Search Engine Optimization (SEO). • This is an SEO neutral channel – meaning this does not hurt, but also does not help your website's SEO rankings.
- No integration with third-party or Equitable-provided web content with your off-platform website.
- Multiple logins to manage various platforms.
- Manual compliance process through AdTrax.

New Website Builds in Website Suite

For FPs who do not have a website today and are looking to build one using Marketing Suite, you can now do so effectively immediately. To request a demo of the website capabilities or to get started with your new build, please visit our [program microsite](#). Detailed pricing information is available below.

For FPs that do not currently have a website:

Please note that all FPs will receive a branded landing page as part of their standard access to the Marketing Suite. The landing page will include the FP's preferred branding, contact information, and a contact form. The landing page can also be customized to a DBA's preferred brand colors. More information on landing pages is available [here](#).

Website Pricing

The home office has worked to obtain discounted website pricing for the Equitable Advisors program. Pricing details for website subscriptions and website add-ons are below:

Website Pricing Structure

Website Type	What's included:	Cost
Essential Onboarding	Do-it-yourself onboarding	\$300 one-time fee
Premium Onboarding	White glove onboarding – work with a dedicated FMG website specialist and designer to personalize for your unique goals.	\$1,999 one-time fee
Website Premium Tool	• Modern Designs • Visual Editor • Essential Content • SEO Tools • One-Click Compliance • Chronological Article Publishing (Blog) • Lead Generation Tools • Forms & Popups • Domain Hosting for Primary Website Domain	\$49 /month
Add-on Services	Learn More:	Cost
Accessibility Lock	https://fmgsuite.com/features/accessibility/	\$49 /month
Copywriting	https://fmgsuite.com/features/copywriting/	\$699 one-time fee