



Brand Use Handbook

for Advisors & Support Teams

May 2026



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Equitable Advisors Brand Overview

Brand Overview

In 2026, we defined a distinct brand for Equitable Advisors as a sister company.

This handbook provides an overview of the key brand elements. It is designed to help you understand where to locate brand resources and how to activate the new Equitable Advisors branding in the field.

Our Look

Our visual identity reflects the balance of professionalism and warmth at the heart of our brand. Clean lines, a refined color palette, and purposeful imagery convey trust and approachability.

Every element — from typography to photography — is designed to feel both polished and personal, reinforcing our commitment to guiding clients with clarity and care.

Our Brand Story

Our brand story articulates our reason for being, captures what our advisors do best, and emotionally connects with our clients.

At Equitable Advisors, we're wealth management experts equipped to deliver meaningful advice for financial situations- from the straightforward to the complex- and, most importantly, yours.

But first, we get to know who you are not just the numbers that factor into your financial decisions, but the values and life stories behind them. Together, we build a goals-based plan that reflects who you are, what you care about, and what you're planning for.

Then we say, "Here's how," helping you put your plan into action with personalized financial advice and a wide range of investment strategies.

And we stay with you as your life moves forward- working hard to keep your plan one step ahead to help you secure your financial well-being and keep it growing.

Our Voice

Sharp — We're intentional with our words and exacting in our ideas. We convey our message as concisely as possible, while never selling ourselves short.

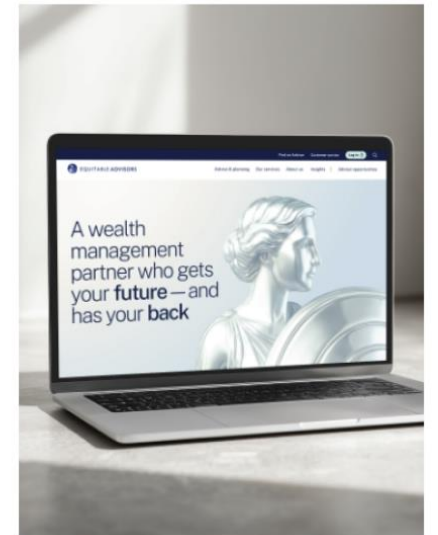
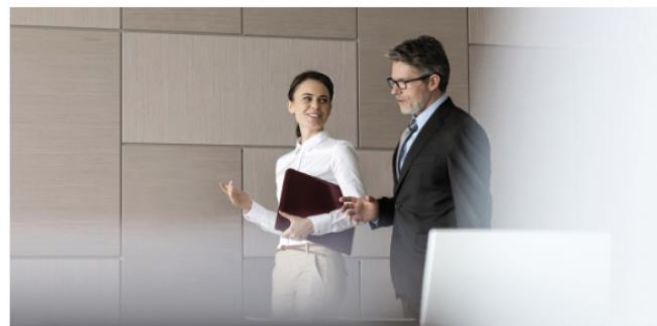
Familiar — We bring comfort to an intimidating category by meeting clients where they are, right beside them in their lives and on their journey.

Thoughtful — We're smart about financial markets and savvy about saying what they mean for clients' lives. Our message is memorable and clarifying, not confusing.

Our Promise

We are advisors who lead with insight and guide with empathy.

Brand Visual Identity



Logos & Co-Branding Lockups

Equitable Advisor Logos

Our logo is available in three configurations:

- 1-line
- 2-line left aligned
- 2-line centered

Where to find correct EA Logos:

Screen-resolution:

.png versions available on [EA BrandHub](#).

High-resolution:

Logos for large format printing sometimes referred to as “vector logos” (.eps and .ai) are available by request through the Brand team and can be requested via brand@equitable.com. Please include details on intended logo use as well as any reference image or specification requirements.



Equitable Advisor Logos

Incorrect use of the Equitable Advisors Logos

For logo questions or brand reviews please email
brand@equitable.com.

Full EA brand guidelines are available on the [EA Brand Hub](#).

EQUITABLE ADVISORS



EQUITABLE
ADVISORS

Do not recolor the logo.



EQUITABLE
ADVISORS



EQUITABLE ADVISORS

Do not use EA blue logo on a dark background.



EQUITABLE ADVISORS

Do not fill icon with a different color.



EQUITABLE
ADVISORS

Do not alter the logo in shape and form.



EQUITABLE
ADVISORS

Do not rotate the logo.

Approaches to Branding with Equitable Advisors:

Equitable Advisors Branded



Co-branded with Equitable Advisors



DBAs can co-brand with Equitable Advisors and granted access to custom co-branded marketing materials by requesting an official co-brand lock-up by emailing wmmarketing@equitable.com.

Co-branding is currently only offered on Equitable Advisors branded materials.

View lock-up request process and complete Co-Branding Guidelines available in the [Equitable Advisors Brand Hub](#)

DBA Branded



Equitable Advisors may operate under their own DBA brand.

Note: Equitable and Equitable Advisors branded materials can not be recreated into a DBA brand.

Brand Resources

EA Brand Resource Locations

EA Centralized Marketing Center

(Sharepoint)
Resources for marketing planning, self-service brand templates, Strategic support and more.

Access the EA Marketing Center [HERE](#)

EA Brand Hub

A robust searchable database of branded assets, photography & templates.

Available via [EA BrandHub](#)

EA Stationary Catalog (Coming soon!)

(powered by Taylor)

Business Cards, Letterheads, Envelopes, Greeting Cards, Digital Business Cards etc. DBA support available. Available via link [HERE](#)

EA Company Store

(powered by Concord)

Apparel, Giveaways, Gifting & Event Assets. Custom orders and DBA support available.

Access EA Company Store [HERE](#)

Order Marketing Materials

(Storefront powered by Toppan Merrill)

Branded marketing materials and kits available for download or ordering.

Co-branded assets accessible to any DBAs who have requested an official co-brand logo lock-up.

Available via Advisor Portal > Tools > Ordering & Purchasing > Marketing Materials

Equitable Advisors Marketing Suite

(powered by FMG)

Your all-in-one platform to easily create, automate, and manage compliant marketing across email, web, and social from a single hub.

Email Signatures

Signature template for both Equitable Advisors and co-brand are available for download on the EA Brand Hub.

Firstname Lastname
Title 1
[Lic #]
Address
m. (xxx) xxx.xxxx | p. (xxx) xxx.xxxx
firstname.lastname@equitable.com
equitableadvisors.com

EQUITABLE ADVISORS

 **Let's talk.** Click here to find a time that works best for you.

Firstname Lastname
Title 1
[Lic #]
Address
m. (xxx) xxx.xxxx | p. (xxx) xxx.xxxx
firstname.lastname@equitable.com
equitableadvisors.com

EQUITABLE ADVISORS

 **Let's talk.** Click [here](#) to find a time that works best for you.

Firstname Lastname
Title 1
[Lic #]
Address
m. (xxx) xxx.xxxx | p. (xxx) xxx.xxxx
firstname.lastname@equitable.com
equitableadvisors.com

EQUITABLE ADVISORS

 **Let's talk.** Click here to find a time that works best for you.

Firstname Lastname
Title 1
[Lic #]
Address
m. (xxx) xxx.xxxx | p. (xxx) xxx.xxxx
firstname.lastname@equitable.com
equitableadvisors.com

Your official co-branded lockup here (png blue)

WITH EQUITABLE ADVISORS

 **Let's talk.** Click [here](#) to find a time that works best for you.

Branch and Real Estate Interior and Exterior Signage

Many landlord/commercial real estate locations limit color, sizing and material options.

For assistance with correct branding for branch and satellite locations please contact the Brand mailbox at brand@equitable.com. Please include photographs and any dimentions/specs provided.

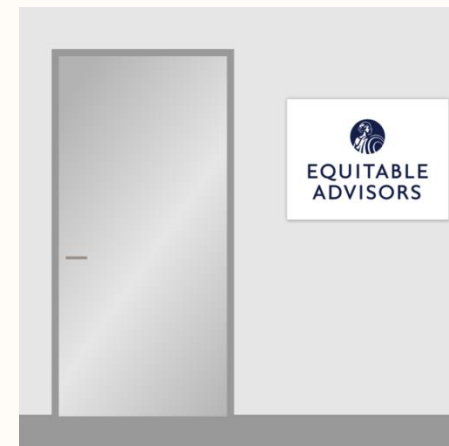


Interior or exterior entry door with name and info

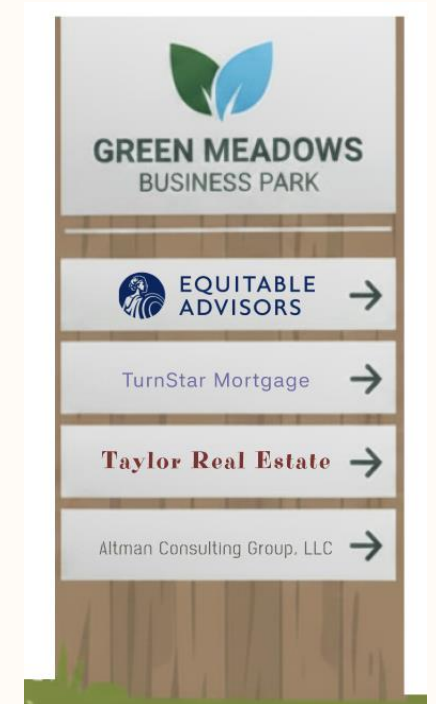
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Reception or focal wall signage



Wall signage



Exterior signage

Social Media Assets & Branding Guidance

Individual Facebook Business Page

Social profile assets are available on the [EA BrandHub](#) (EA logo) and [EA Marketing Center](#) (co-branded logos)

- Select high-quality professional headshot for profile image
- Name of page should follow the format:
First Last, Equitable Advisors, LLC
- Cover image available via [Brand Hub](#)



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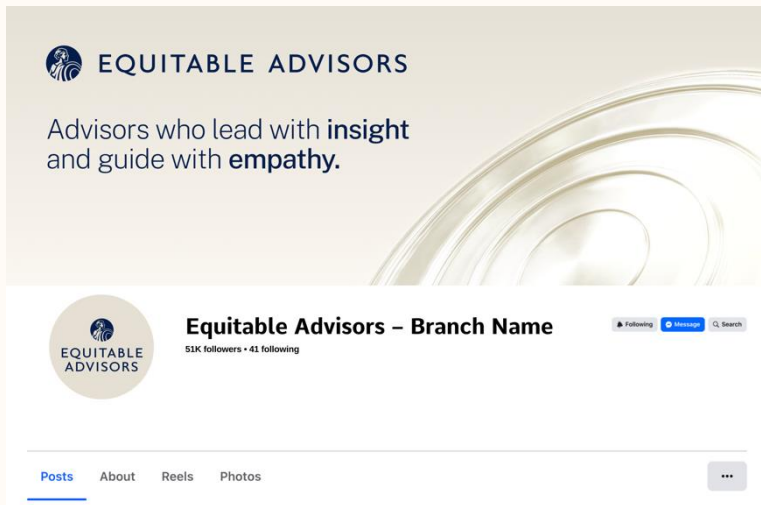


Cover Images

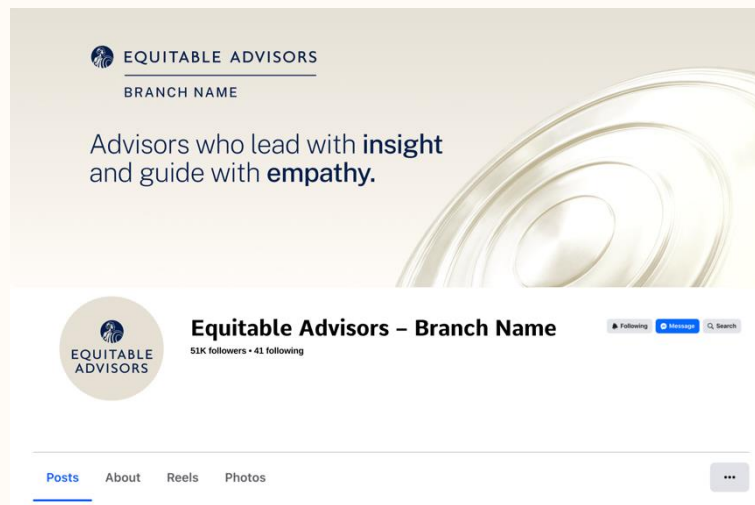
Branch Facebook Business Page

There are a few approaches to Branch Facebook pages. For consistency use the same approach for social and web presence. Custom branch lock-up images and custom photographic assets can be requested via WMMarketing@equitable.com.

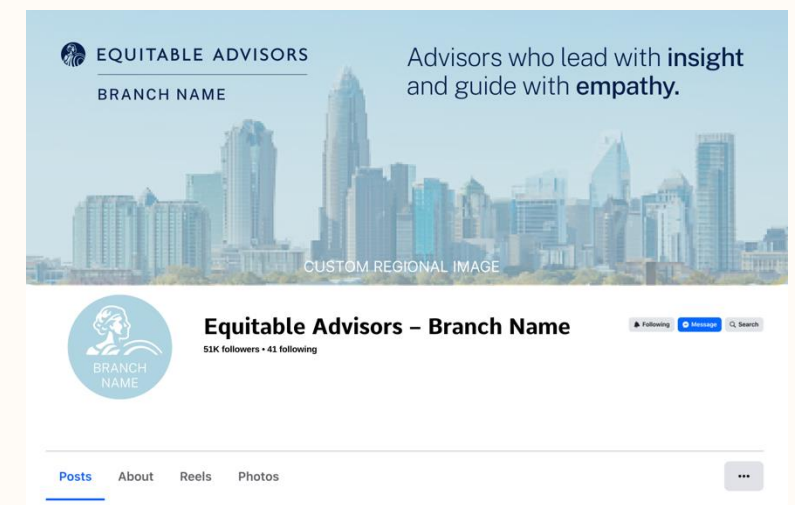
- Select the standard, custom standard or custom photographic cover image and profile image. Standard assets available via [EA BrandHub](#)
- Name of page should follow the format... **Equitable Advisors – Official Branch Name**



Standard
Available via [EA BrandHub](#)



Custom Standard
Available via request to
wmmarketing@equitable.com

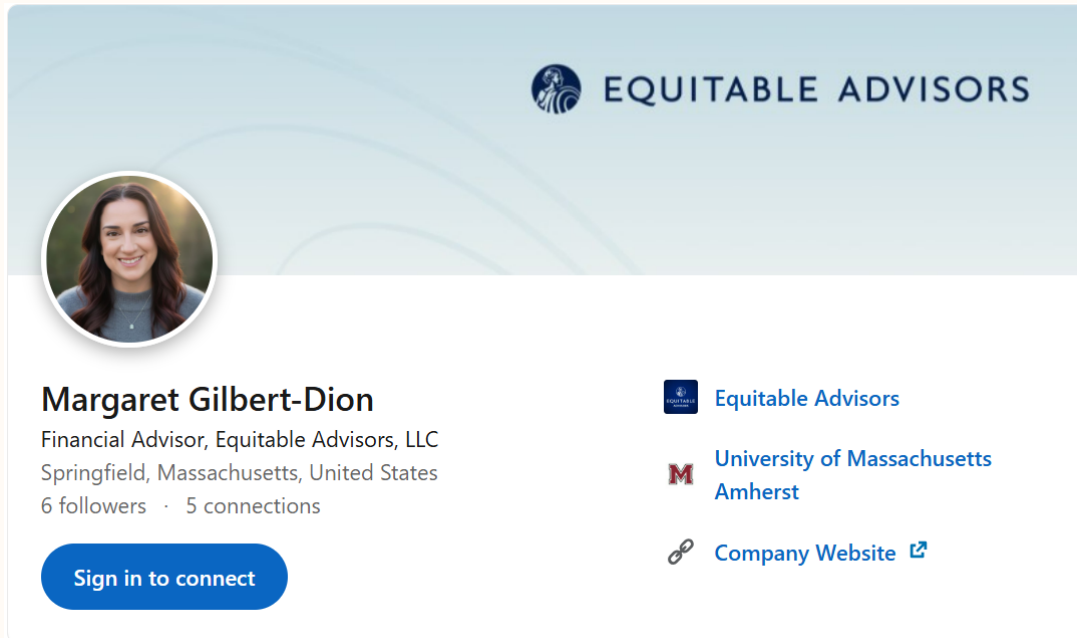


Custom Photographic
Available via request to
wmmarketing@equitable.com

Individual LinkedIn Page

Social profile assets are available on the [EA Brand Hub](#) (EA logo) and [EA Marketing Center](#) (co-branded logos)

- Select high-quality professional headshot for profile image
- Name of page should follow the format :
First Last
Compliance approved title, Equitable Advisors, LLC
- Cover image available via [EA BrandHub](#)



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Cover Images

Physical Branded Assets

Promotional Give-aways & Gifting

The preferred promotional item vendors for Equitable Advisors are Concord and HALO. All brand reviews conducted automatically by these vendors, no need to submit to the brand mailbox for approvals.

Orders using Equitable Advisors branding placed outside of preferred vendors must have proofs submitted to brand@equitable.com for approval prior to ordering.

Equitable Advisors Company Store

(powered by Concord)

Apparel, Giveaways, Gifting & Event Assets.
Custom orders and DBA support available.
Use Ariba punch-out for purchases using cost centers.

Available [HERE](#)

Equitable Advisors Pop-up Store

(powered by HALO)

Limited-time unique branded items and apparel.

Available for a limited time via EquitableAdvisorsPopUp.com.

Event Assets: COMING SOON

Events assets can be found in the promo store via Concord.

EA Promo Store Event Asset Category (powered by Concord)

Equitable Advisors branded banner stands with swapable-covers, backdrops, table covers.

Available [HERE](#)



Questions:

Contact brand@equitable.com or
wmmarketing@equitable.com