

Control Your Future . . .

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Ensure Your Independence



*As an Equity Associates Partner,
you're in control . . .*

Ownership with Control

Your Future:

- Equity Associates mutual fund dealership was established in 2003 and now has over 150 Advisors with \$2.5 billion in assets under administration.
 - We've created a high end boutique mutual fund dealership built expressly for the Highly Successful Financial Planner.
 - The Capital Structure of Equity Associates promotes a synergistic working relationship with the head office. All financial planners sponsored by Equity Associates will own shares of the company. There will be a maximum of 250 Partners.
 - The unique sales provision ensures that Equity Associates will not be sold without the approval of the Partners. This ensures that the Partner has control over the ownership of the company and the strategic direction taken by management.
- Equity Associates operates with a flat fee structure. All Partners receive 100% of the commissions earned in exchange for a flat monthly fee. The fee does not go up as the business of the Partners increase.

Back Office Excellence

Equity Associates provides a complete back office system to support its Partners' success:

Client Registration System -

CRS provides our Partners with a state of the art, professional account opening software system.

Transaction Processing Software –

Winfund software provides all Partners with a secure, Web-based interface for daily transaction and client reporting functions.

Partner Services –

A team of highly trained individuals are responsible for solving any problems that arise, to minimize administration time of the Partners.

Managing Your Partnership

Partners are involved in all aspects of the firm through election to the Board of Directors and participation in Committees.

*Equity ...
heading in
the right direction.*

