



YOUR FAMILY HAS A MULTITUDE OF FINANCIAL NEEDS



OUR FAMILY OF SPECIALISTS HAS A WEALTH OF FINANCIAL MANAGEMENT SOLUTIONS

HOW CAN WE HELP YOU?

WHO ARE WE?

Equis Financial has helped more than 100 thousand hard-working Americans protect their families against the unexpected loss or disability of a breadwinner. Of course, that's just part of what we do.

Our affiliate, Equis Retirement Solutions, equips our clients who are serious about long-term planning with safe savings and protection solutions that provide guarantees and peace of mind. Our Retirement Solutions Specialists are trained to listen and understand your life's goals, offering customized options that will help you make decisions that are right for you and your unique situation.

Equis Financial can help you meet a multitude of financial needs... from covering your home's mortgage, to funding your children's education, saving for retirement, long-term care, or protecting your estate from unnecessary expenses and taxes.

What do you want to achieve? What is your timetable? Where is your financial comfort zone?

With so many insurance, annuity, and investment products to choose from, it's not easy to determine which is the best value, especially when each is designed with a particular purpose in mind. Our team of specialists take the time to listen to your needs & concerns to best understand which products and strategies will work best for your situation to help you create financial independence for a lifetime!



RETIREMENT FUNDING

Can we achieve our goals?



TAX-FREE INCOME SOLUTIONS

Where can I save money for my retirement with tax-free access in the future?



MORTGAGE PROTECTION

Can we keep from losing our home if a breadwinner is disabled or worse?



LIVING BENEFITS

How can I access my life insurance death benefits while still living if I suffer a heart attack, stroke, or cancer?



EDUCATIONAL FUNDING

How do we pay for our children's education?



COVERAGE FOR CHILDREN

Can we obtain lifetime insurance coverage for our kids?



ASSET PROTECTION

Can we protect our assets from market volatility?



ESTATE DISTRIBUTION

Can we pass our assets to our heirs without the time and expense of probate?



SMALL BUSINESS PROGRAMS

How can I ensure that our business can stay in business if something happens to me or my business partner(s)?

