



Phillip Natale has worked in the financial industry since 2005. He started his career as a junior partner at Morgan Stanley, where he achieved his licenses and developed his understanding of the various financial investment markets. Soon after, Phillip decided to advance his career by joining AXA Advisors, LLC, now known as Equitable Advisors, where he repeatedly saw his clients' need for a more holistic and

comprehensive approach to retirement planning beyond simple investment. Through further education and training, Phillip joined AXA Advisors, Retirement Benefits Group and obtained the Retirement Income Certified Retirement Professional® designation where he now focuses on working with state, county, and local municipal employers and their employees.

Teaming up for you, Phillip Natale has built a team of comprehensive retirement professionals to even better serve clients' growing need for Comprehensive Retirement Planning. The team focus is to provide 457 deferred compensation to government, county, city and local public employees and to help them understand financial planning, wealth management, investment allocation, life insurance, retirement strategies, long term care and estate planning strategies. By forming this team, we understand the financial needs of governmental employees and their families.

Phillip Natale and his team are dedicated to helping you make sure that you and your families are protected and that your investment strategies are putting you on track toward achieving your financial goals. Phillip's superb financial experience regarding proper education, investments, retirement, and life insurance planning, as well as his excellent, personalized client service, can help you ensure that your individual retirement plan will meet your and your family's needs.

Comprehensive Retirement Planning Strategy

Phillip and his team provide financial planning strategies through a simple four-step approach:

- By providing an initial consultation and assessment of personal financial wants, needs, and goals
- By analyzing and prioritizing your information and goals
- By presenting the strengths and weaknesses of a particular financial plan options
- By taking the appropriate actions at the appropriate times to best serve your financial interests through a process of ongoing reviews

Phillip and his team find that clients appreciate ongoing reviews, which can assist them in defining their financial goals. Your financial plan is like a living organism, and so it can evolve as your life does. Phillip and his team understand that lives change, plans change, and things happen, and they will be there for you as they do.



Phillip M. Natale RICP™
3700 Embassy Parkway Suite 330 • Akron, Ohio 44333
Phone: 330-299-1251 ext.9
phillip.natale@equitable.com • www.oh457io.com