



EQUITABLE ADVISORS



BILL STREY

- FINRA Series 7, 66
- Accident & Health, Life & Variable Licenses

Financial planning starts with people, not numbers. With that in mind, it is important to introduce myself. On the personal side, I have lived within 10 minutes of my current home in southeast WI my entire life, loving the uniqueness of small-town living around the Twin Lakes & Genoa City area. I am lucky to have a beautiful wife Crystal, and a loving family that includes my parents, sisters, nephews, and nieces. We enjoy never-ending DIY home projects inside & out, but my lifelong passion is the game of golf. I am also honored to be a current officer for the Twin Lakes Area Chamber & Business Association.

My journey to join Equitable Advisors was a unique one that included receiving a bachelor's degree from UW-Green Bay in 2008 (Math major, Education minor). The plan was to teach high school math! But plans change, leading me to the Food & Beverage Director position for the local golf course I had grown up playing & working at. Being a part of a small-town business that focused on the community allowed me the honor of touching many lives through daily service, weddings & charity golf outings. After leaving the golf course and spending 6 years in a sales role for a local manufacturing firm, it was time for a new challenge.

The decision to join Equitable Advisors in 2022 was rooted in a few professional priorities.

- The ability to positively impact individuals & families in a meaningful way.
- An opportunity for unlimited professional growth & learning.
- Financially provide for my family & support my community.

Being part of the team that focuses on serving educators & public employees throughout Wisconsin has been the perfect fit. In addition to working in schools, I am a passionate resource for professionals in many walks of life. Every client is taken through an educational process to help them understand their options in a constantly changing financial landscape.

If you or someone you know would benefit from a no-pressure conversation, please reach out. Opening meetings are done at no cost. The only expectation is an honest conversation about my approach client relationships. In an increasingly digital world, *I welcome a phone call anytime.*

Building a Financial Plan

Start with a good foundation

Debt management, emergency savings, and life & disability income insurance are the basics of any sound plan.

The next layer

Let's look ahead to the future... your retirement goals & other financial needs on the more immediate horizon.

Other goals

Now we can plan for optional spending based on your priorities... vacations, kids' college, charity & so much more!



111 E. Kilbourn Ave. Suite 800
Milwaukee, WI 53202



(414) 278-1579



William.strey@equitable.com

William Strey offers securities through Equitable Advisors, LLC (NY, NY 212-314-4600), member FINRA, SIPC, offers investment advisory products and services through Equitable Advisors, LLC, an SEC-registered investment advisor, and offers annuity and insurance products through Equitable Network, LLC. Equitable Advisors and Equitable Network are affiliated companies and do not provide tax or legal advice. **Representatives may transact business, which includes offering products and services and/or responding to inquiries, only in state(s) in which they are properly registered and/or licensed. Your receipt of this e-mail does not necessarily indicate that the sender is able to transact business in your state.** For more information about Equitable Advisors, LLC you may visit <https://equitable.com/crs> to review the firm's Relationship Summary for Retail Investors and General Conflicts of Interest Disclosure. AGE-5495464.3(02/25)(exp.02/29)