

# Speeding Your Growth Journey



We meet you where you are—and help you get where you want to grow.



## Onboarding

95% targeted AUM transitioned within 45-60 days.<sup>1</sup>



## Support

Nearly 1,000 Cetera support team members.

## Personalization

Multiple affiliation options and peer communities.  
Your own Growth Leader and Regional Growth Team.



## Technology

40+ tools integrated with award-winning AdviceWorks® platform.



## Solutions

70+ services and solutions, plus financial planning, insurance, legal, retirement, tax, and trust specialists.

## Advisory

900+ annual commentaries, updates, and research findings.  
100+ strategists and nearly 400 account managers.<sup>2</sup>



## Scale

Capital, national infrastructure, and enterprise-grade digital solutions.



## Value

\$150K+ worth of branding services at no cost with GrowthLine.

Continuous investment in advisor resources.



## Satisfaction

36,000+ 5-star reviews by independent advisors.<sup>3</sup>

<sup>1</sup>Based on internal metrics for financial professionals onboarded between Jan. 2020 and Dec. 2024.

<sup>2</sup>All data as of March 2025.

<sup>3</sup>Based on Cetera's Support Center customer experience surveys, Nov. 10, 2020 – June 30, 2025.

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