

Lead boldly, scale smarter

- Over 3,000 affiliated advisors
- 14% annual average AUM growth, 2022-2024
- 97% retention rate¹

Whether you lead a large team, super OSJ, or aggregator, Cetera delivers resources that let you stay focused on what moves you. Tailored solutions and dedicated teams empower you to thrive, even as our wide range of affiliation models and options helps you maintain a perfect fit with your community and culture.

Serving large enterprises and super OSJs focused on affluent and high-net-worth clients

Multiple affiliation options to maintain your community, culture, and business model

Deep recruiting and organic growth proficiency underwritten by Cetera's capital

Low-friction succession program and custom playbook to build your W-2 model



Over 36,000 5-star reviews for advisor satisfaction²

Big-firm resources

Comprehensive support: accelerate your growth with a unique degree of infrastructure support, local resources, and advanced operational capabilities.

National network: leverage tried-and-true workflows and capabilities that can help you save time and increase scale.

Award-winning technology: gain a unified advisory platform featuring over 40 tools, end-to-end digital workflows, and dedicated support teams.

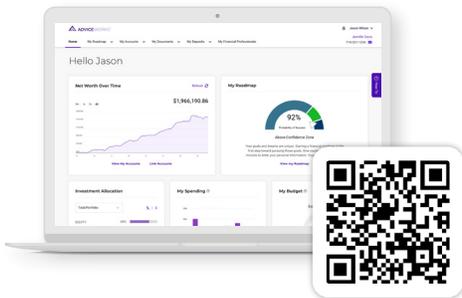
Small-firm relationships

Personalized for you: join a close-knit culture in our specialized support communities, with peers and leadership who understand your business model.

A single point of contact: access resources and expertise easily with your own dedicated Regional Growth Leader and Regional Growth Team.

Multi-stage support: get what you need when you need it, with tailored solutions and coaching that meet you where you are in your business.

Where Independence Finds the Structure to Scale



A personalized, seamless transition.

Our award-winning onboarding experience melds technology and customized planning to keep you in control.



Growth you can count on.

Looking to grow organically, through hiring, or by acquisition? We can help you do it with unprecedented confidence.



A powerhouse brand that helps you stand out.

Set yourself apart in the race to engage clients, attract prospects, and recruit new talent.



More valuable relationships.

Uncover hidden opportunities for clients with our suite of AI-powered solutions and services.

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