

Turn tax alpha into business alpha

- Over 3,800 advisors
- 28% annual average AUM growth, 2022-2024
- 97% retention rate¹

For CPAs, licensed tax pros, accounting firms, and advisors, Cetera's independently supported peer communities offer expertise to sharpen your tax-focused approach. Set yourself apart with tailored financial planning and investment solutions, backed by dedicated teams that understand tax complexities and foster a culture of shared success for you and your clients.

Serving tax professionals and large accounting firms focused on differentiation

Increase tax alpha YOY for clients while adding incremental growth to your business

Turnkey succession program eliminates repapering and keeps your entire service model intact

Flexibility to become a tax-intelligent advisor without licensing or in-house specialists



Over 36,000 5-star reviews for advisor satisfaction²

Big-firm resources

Specialized support: access a strong network of CPA partners, tax-intelligent platforms/processes, plus solutions for Fidelity, Pershing, or Schwab clearing.

Comprehensive solutions: enhance your capabilities with over 70 unique financial services and solutions, plus best practices used by 12,000 professionals.

Tax-intelligent platforms and processes: focus on after-tax results with technology and resources that can replace manual work in a fraction of the time.

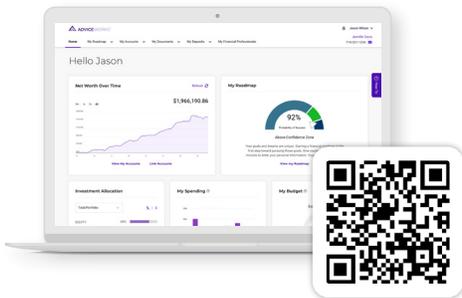
Small-firm relationships

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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