

Your Growth, Personalized— The Power of Regional Growth Teams



At Cetera, we believe the best growth happens when every advisor has a dedicated team behind them—people who understand your business, your clients, and your goals.

That's why we've reimagined advisor support around **Regional Growth Teams (RGTs)**—specialized groups of professionals dedicated to empowering your success through **personalized consulting, actionable insights, and measurable outcomes.**

RGTs bring the “big-firm power” down to a personal level, helping you act decisively, efficiently, and strategically. RGTs ensure that every advisor has the service they need and know exactly who to go to for support.

What Makes Our Advisor Support Different

Every advisor is connected to a **dedicated RGT** responsible and accountable for helping your practice grow. Your RGT becomes your day-to-day partner in building a stronger, smarter, and more profitable business.

With your RGT, you receive:



Proactive Business Consulting

Strategic advice to strengthen your firm's financial and operational health.



Growth360™ Integration

Access to Cetera's proprietary diagnostic platform to map your path to growth.



Data-Driven Insights

Analytics that pinpoint opportunities and track your progress over time.



Tailored Solutions

Recommendations for marketing, recruiting, and client engagement strategies that fit your business.

Your Clear Path to Growth

Your RGT provides a personalized roadmap that:

- Identifies your **largest opportunities** for growth and valuation enhancement.
- Maps **near-term wins** and long-term strategic initiatives.
- Tracks your progress toward your plan with **Growth360™ diagnostics.**
- Ensures **consistent accountability** through ongoing collaboration and check-ins.

Our goal is to increase the probability of success for every advisor and firm we serve.

Expertise That Works for You

RGTs bring the right mix of expertise and insight to your firm's growth journey:

- **Regional Directors:** Senior advisors and consultants who help you design and execute strategic business plans.
- **Business Management Consultants:** Experts in operational efficiency, profitability, and valuation enhancement.
- **Channel Support Resources:** Functional teams within each business channel that provide risk management, recruiting, and sales operations guidance.

Together, they ensure your growth strategy is actionable, measurable, and sustainable.

Powered by Insight—The Diagnostic Approach

We know that lasting growth comes from understanding your business deeply. That's why Cetera's RGTs use a diagnostic model powered by our Growth360™ platform to identify opportunities and track results.

How it works:

1. **Business Diagnostics:** Compiles a complete practice profile using data and advisor input.
2. **Competitive Benchmarking:** Compares your firm to high-performing peers and industry archetypes.
3. **Growth Inhibitor Analysis:** Identifies barriers to success and the best path to overcome them.
4. **Actionable Roadmap:** Outlines short- and long-term growth initiatives designed for measurable progress.
5. **Consistent Measurement:** Ongoing data reviews keep your plan on track and aligned to your goals.

This **data-informed process** transforms insight into action—helping you achieve organic, predictable growth across your entire book of business.

Bringing It All Together: Dedicated Support & Community Backing

Your dedicated RGT will connect you with a personalized group of like-minded advisors for strong peer-to-peer support within your Regional community.

Ready for dedicated and personalized growth support?

Visit cetera.com to learn more.

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