

SOAR ABOVE THE REST

Some services may be add-ons and incur an additional charge. All listed programs are accepted for compliant use by our broker-dealer at the time of this publication. All program trademarks and registrations belong to their respective owners. These services are not mandatory for advisor use and may not be applicable to your practice or situation.

Talking with Sunrise co-founder, Nick J. Russell, is a crucial step in ensuring a smooth transition into the firm, whether you are looking to onboard and join our team or are retiring or selling your practice.

START TODAY

Nick J. Russell, CRPC®
Founding Partner, Investment Advisor Representative

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Securities and advisory services offered through Cetera Advisors LLC, member FINRA/SIPC, a broker-dealer and a registered investment advisor. Cetera is separate from any other other named entity.

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JOIN THE ADVISOR
TEAM



BOUTIQUE, FAMILY-STYLE FEEL.
Nationwide reach and impact.

BEHIND THE SCENES

The powerful network of independent advisors we work with spans across the country, providing ongoing training, guidance, troubleshooting, and continued education.

Broker-Dealer Network

Sunrise Wealth Advisors is registered to conduct business under Cetera Advisors LLC, a subdivision of Cetera Financial Group®.

Exclusive Advisor Conferences

Connect with peers across the country, attend keynote presentations, and learn more about other advisors' success and growth

Investor Engagement

Add intangible value by inviting clients to featured webinars such as Cetera's 'In the Room' initiative, where Dr. Ben Bernanke and Lamar Odom, Jr. have been keynote speakers. Other notable guest speakers include George W. Bush, Jr. and our very own advisors!

75+ YEARS OF EXPERIENCE

Our Sunrise Wealth Advisors team has over 75 years of combined industry experience.

Peer Experience

Your fellow advisors are established professionals, well-versed in the implementation of industry systems, procedures, and overall client servicing

Hassle-Free Environment

Continue building your book of business in the working style you are adapted to. Mail and client supplies are always in stock at the office, so no need to track overhead and paper orders.

Expansive Network

Connections to contacts in other industries, whether it be a printer, mentor, sales rep, or dedicated support team



TECH OFFERINGS

Advanced Technology

From product comparison tools to interactive financial education quizzes, engage and awe your clients with access to some of the most accredited financial platforms available to the public.

Website Resources

Our firm's website features videos, articles, calculators, quizzes, and market commentaries for your prospects and clients to utilize at will. Offer this valuable resource as a convenient way for your contacts to stay connected.

Stringent Cybersecurity

Each program used has transparent privacy and security procedures in place. Feel confident in connecting with your clients and protecting their right to confidentiality.

COMPLIANCE & SUPPORT

Remote Compliance Team

Designated supervisory support with inclusive assistance in recordkeeping, compliance submissions, and onboarding guidance.

Remote Administrative Assistance

Trained specifically to support independent advisors like yourself, you have the option to hire administrative staff members to support your vision of long-term growth.

Engagement Team

Conduct business with the convenience of connecting with the same operational support team at Cetera. Chatting consistently with familiar names helps you to initiate requests or fix a NIGO with streamlined ease.

Client Relationship Guidance

Our office has an assigned client relationship manager, whose role is to assist with resolving client issues, escalating requests, routing you to the correct department, and general service assistance.

Main Tel: (407) 351-FIRM(3476)

WWW.SUNRISEWEALTHADVISORS.COM

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