



Build the Business You Can Imagine

Becoming a Totus Network Partner means you have the freedom to build the business you have always imagined. You will have the support of a powerful network to help build your practice with the autonomy to serve the best interests of your clients.

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Independent But Not Alone

The benefits of going independent are many, such as communication, marketing, customization, technology and client service—and ultimately the ability to offer conflict-free advice. The popularity and success of independent service models have grown tremendously in the past few years. Below are a few of the many great reasons to go independent.



Design Your Business Around Your Clients

Enjoy the freedom of tailoring your practice to your clients' needs and preferences.



Growth of Independent Models

Supported independent models are on the rise as they allow for greater freedom and control, but as a network partner, you'll never have to do it alone.



Offering Conflict-Free Advice

Independence means only offering the products and services that will actually be the best fit for your clients instead of pushing pre-established solutions.



Access to Powerful Technology

Benefit from access to award-winning technology with simple integration that makes your business processes easier and more effective.



Shrinking to Grow

Make the move from big brands to supported independence and shift from an employee-advisor mindset to a fiduciary-entrepreneur mindset.



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“At Totus, we are committed to helping you build the practice you have always imagined.”

James Starnes, CFP®
President & CEO

We Are Working to Get Better Everyday. Are you Ready?

Totality as a whole is superior to its elements. Totus Wealth Management is a different kind of wealth management firm, one focused on the totality of your business.

Our philosophy is built on the idea that we consider the totality of our client's financial portfolio and goals so we can provide more comprehensive guidance.

Totus Wealth Management works the same way with our Totus Network Partners. We work with each Advisor to understand your hopes and dreams for your firm and work together with you to reach those goals.



Imagine Your Practice. Your Way.

You're dedicated to your practice and your clients, but the day-to-day of operating your business could actually be limiting your success. Imagine a turnkey infrastructure that allows you to leverage your time without stretching yourself too thin, giving you the ability to focus on your real priorities.

Serve Clients Your Way

You want access to valuable resources and support, but you also want to maintain your business identity and your way of engaging with your clients. When you partner with us, you'll get the best of both worlds.

Become an Entrepreneur

Becoming an entrepreneur doesn't have to mean that you're starting out on your own. Start your business with the support of a network backing you, helping to guide, empower and encourage you on your path to success.

Avoid Big Brand Influence

Protect your independence and your freedom to run your practice your way. Joining us as a partner means you'll get all the powerful benefits of our network without the restrictions and drawbacks you'll find with big brands.

Build Something Great

You value your independence and you're proud of your individuality; however, have you thought of bringing that spirit to a community of like-minded partners? Let's see what we can create and become, together.

BECOME A TOTUS NETWORK PARTNER

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Why Totus?

We are a powerful network and a caring community made up of unique and independent individuals and businesses. We believe in and understand the intrinsic value of independence, but we also know the power of community. When you partner with us, you can trust that we will value and respect your identity and independence, but you can also trust that you'll have a community backing you, supporting you, and rooting for your success at every turn.

Strong Heritage

We are highly experienced professionals. Our diverse team has over 60 years of experience and with our unique "Experts Together" approach, we work in unison to serve our clients as a team. When you're a part of our network, you're backed by a powerful community and an impressive track record of experience and success.

Great Culture

Honor, dignity and respect are central to our way of business and we believe in the collective wisdom of our network. We pride ourselves on being extraordinary, collaborative and dream-oriented. Totus is the total package and when you join our team, you'll be backed by powerful partners and a caring community of like-minded professionals.

Conflict-Free Environment

We believe in ethical practice and the ability to offer conflict-free, independent advice to your clients. As a Totus Network Partner, you'll never be obligated to push proprietary products and services. You'll have the freedom to craft your business offer around the unique needs of your clients, always putting their best interests first.

Extraordinary Team

We are a different kind of wealth management firm, focused on the totality of your business and the power of the collective potential of our community of professionals. We believe that together we can do more, create more, connect more and see more dreams realized. Join a network of support and collaboration like no other.

Looking for People that Share Our Passion

Below are three things you must be able to answer Yes to in order to join the Growing Team.

Great for Your Family

Are you and your team members ready for the next level? Are you all committed to the growth of your business as well as your own professional growth?

Great for Your Clients

Do you believe that joining as a Network Partner will bring greater success to your business and thus be the best course of action to support the interests of your clients?

Great for Totus

Does your practice uphold the same values as Totus? Are you ready to contribute to a community that uses collective skills for the growth and achievement of the whole?

BECOME A TOTUS NETWORK PARTNER

Joining Forces

Freedom to Be Independent; the Wisdom to Build Community

Cetera delivers personalized independent guidance, backed by a strong community that helps you thrive.

Founded in 1983, Cetera Financial Group was built on the belief that financial professionals could reach greater success by joining high-performing, regionally focused teams. It's in that spirit of collaboration that we support the financial professional with:

- Access to a wide range of investment solutions to develop a financial strategy that fits your needs
- Collaborative technology that keeps you in sync
- Support from knowledgeable subject-matter specialists to help guide your investment strategy
- Regulatory oversight to monitor your practice

A Powerful Network of Support

With Totus and Cetera, we'll never treat you like a number, but these numbers help tell our story.

We're adamant about the virtue of independence to our core—but also think the greatest value comes when people's independent spirit and ideas form the basis of a community. One that uses the collective skills to create more: more connection, more growth and more of life's dreams realized.

*Number of affiliated financial professionals/institutions and financial data as of March 31, 2025. Cetera Financial Group (Cetera) refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. 655 W. Broadway, 11th Floor, San Diego, CA 92101. For use of financial professionals only. Not for public use.

\$554B
assets under
administration*

425+
financial
institutions*

\$246B
assets under
management*

11,600+
financial
advisors*

BECOME A TOTUS NETWORK PARTNER

Leadership

Our mission is to support you and your business in achieving your dreams because your success is our success. We approach our Advisors the same way we approach our clients. We get to know you and the unique needs of your practice and find the best ways to support you in reaching your individual goals. Meet the team that makes it happen.



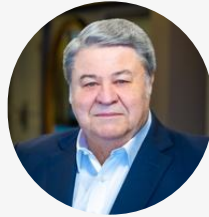
James Starnes,
CFP®

President & CEO



Sandra Diaz*

COO/CFO



John Wheeler,
CFP®, CLU,
ChFC®, CRPC,
LUTCF, LACP,
CLTC

Executive Senior
Partner



Todd Mackler,
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Sammy Salek,
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Richard L. Farrar,
CFP®, CLU®, AEP,
ChFC®

Senior
Consultant



Michael Porter,
CFP®, CPA

Director of Field
Development



Daniel Carroll**

Director of Field
Development



Paul Park**

Director of Field
Development

Our Partners



ADVISORS LLC
Member FINRA/SIPC



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Registered Representatives offering securities through Cetera Advisors LLC, member FINRA, SIPC. Advisory services offered through Cetera Investment Advisers LLC, a Registered Investment Adviser. Cetera firms are under separate ownership from any other named entity.

Join the Growing Team

Totus Wealth Management offers Financial Professionals an extensive suite of practice management tools that allow you to focus on building your practice and doing the work you love. You are not alone!

Practice Development

From coaching, to financing, office set up and more, you'll receive powerful support to help grow your practice.

Technology Support

You'll get assistance with initial technical office set-up as well as ongoing technical support and troubleshooting.

Conferences & Events

We are invested in your success. We'll keep you connected and growing alongside peers and industry experts.

Succession Planning

Prepare for what's next and protect your legacy, even as you're building it. Access our resources to guide you through your plan.

Marketing Support

Benefit from licensing and branding support, as well as turnkey marketing and social media strategies and more.

Human Resources

We offer remote office assistance, payroll set up and processing, and group healthcare for all your W2 employees.

Investment Management

You'll get access to monthly investment committee calls, quarterly notes, and you'll get fund use and allocation access.

Qualified Retirement Plan Support

We help review plan designs and connect you with partners that provide further specialized QRP support.

Risk Management

Life insurance, long-term care, disability, and annuities without carrier commitments or quotas. Plus, product support when and how you need it.

New Client Onboarding

Get assistance with onboarding processes when you hire new Advisors, including assistance with covering transition costs.

**BUILD THE BUSINESS
YOU WANT TO BUILD.
JOIN THE GROWING TEAM.**

www.totuswm.com/why-totus
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Give us a call 832.220.3602

Partnership Highlights

Totus Wealth Management offers Financial Professionals an extensive suite of practice management tools that allow you to focus on building your practice and doing the work you love. You are not alone!

Practice Development

For our Totus Network Partners, we provide the necessary guidance, support and tools to help you develop your business. You'll enjoy benefits such as:

- coaching for the growth and development of your business
- turnkey marketing and assistance with lead development for your business
- ongoing, personalized support through your regional officer

Compliance & Supervision

Grow and operate your business with confidence knowing you'll have support and oversight to keep you on track and compliant in this highly regulated industry. These benefits include:

- marketing support and advertising review
- trade, correspondence and email review
- compliance accountability and support for managing compliance issues

Service & Support

When questions and other needs inevitably arise, as a Totus Network Partner, you'll have a reliable network of support you can always call upon. You'll have access to:

- a dedicated support team, including your regional development officer
- assistance with technical office set-up, including phone service and equipment, internet, fax, TVs and conferencing capabilities
- troubleshooting with our excellent technical support team

Operations & Management

As a Totus Network Partner, you'll benefit from our assistance with daily business operations and management concerns. We offer assistance and guidance for:

- ongoing and timely support for questions regarding business operations
- best practices, tips, and time-savers
- transitioning and onboarding new advisors, including covering costs for their transition



Benefit from Our Support & Growth Strategies

We have done it before and we will continue to help practices grow. If you are looking for a new experience, it may be time to join our growing team. Totus Wealth Management is led by James Starnes, CFP® and a powerful team of like-minded professionals who help Advisors attract new clients, grow assets under management, deliver a seamless client experience and build a successful practice.

Begin Onboarding

Join the Totus Network and benefit from individualized training, ongoing support and turnkey benefits.

Transition Team

Rely on a team of experienced transition specialists to support you throughout the entire process, creating a more seamless transition.



You're Ready for Independence. We can help.

Totus Wealth Management has been recognized with the Cetera Circle of Excellence award, an honor reserved for top-performing firms across Cetera's nationwide network. This distinction reflects our team's unwavering commitment to serving clients with excellence as the standard.

BECOME A TOTUS NETWORK PARTNER TODAY. JOIN THE GROWING TEAM.

www.totuswm.com/why-totus
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Contact us at 832.220.3602

*The Cetera Financial Group's Circle of Excellence recognition was awarded to Totus Wealth Management; it is not a guarantee of future investment success and should not be construed as an endorsement of by any client. For use of financial professionals only. Not for public use.



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