

## EXCEEDING EXPECTATIONS

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®  
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EXTENSIVE  
RESOURCES

**FINANCIAL TOOLS THAT WORK**  
for you and your clients.

TIME SAVED IN YOUR PRACTICE

## DAILY OPERATIONS

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We have access to a powerful network of programs and tools designed specifically with your clients and independent practice structure in mind.

### 1. Secure Client Portal

Clients are provided with private access to their account portfolios through AdviceWorks®, a comprehensive platform with capabilities such as access to financial plans, the ability to privately upload documents, and the option to add outside accounts.

### 2. Tax Strategy Software

Add a 'Wow!' factor with Covisum's Tax Clarity® software, an advanced system that identifies sub-optimal tax events and pinpoints potential opportunities to maximize specific tax strategies.

### 3. Automated Advice Fee Payments

Offer clients peace of mind with an automated payment option for their financial advice fee. Free up your time by letting AdvicePay take the work out of tracking advice fee payments.

### 4. Social Media & Email Automation

Browse the MarketingCentral® library, full of relevant and compliant material for prospects and clients.

### 5. MoneyGuidePro®

Browse the library full of relevant and compliance-approved material, categorized by topic and

### 6. Riskalyze®

Confidently build financial plans with the ideal amount of risk exposure identified by Riskalyze® tools.

### 7. Pentameter

Track business growth and identify short and long-term goals for your practice.

### 8. ID 360°

Be proactive in protecting yourself and your valued clients against cybersecurity threats.

## LOCAL OFFICE CONVENIENCE

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Our Orlando office means you have an address you can call home and share with your clients. If you are remote, a staff member will notify you of any incoming mail or IFA.

In-office paper and mailing supplies are provided for all new advisors. Allow us to take care of ordering and stocking supplies while you focus on your practice.

You have the flexible option of receiving automated email notifications for private voice messages and fax message copies with imaged attachments, 24/7.

## BACK OFFICE SUPPORT

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### Manuals, Training, + Guides

Gain access to detailed procedures and policies, explore the SmartWorks™ Click-N-Play interactive library, attend program trainings, live Q&A's, and roundtable discussions with your industry peers.

### Industry + Regulatory Notices

Your broker-dealer works diligently to provide its advisors with timely access to industry and regulatory updates. Stay informed on policy changes, CE opportunities, renewal reminders, advisor calls, and more.

### Client Paperwork

Sign up for paperwork status email notifications. Contact your dedicated support team with inquiries, NIGO troubleshooting, and general guidance. Offer clients the option to e-sign forms and opt-in to e-delivery.

### Practice Management Consultation

Work with a growth officer to examine all marketing, practice expansion, and leads generation opportunities. Learn more about advisor-assistance tools, time management, and organizational tactics.

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

[WWW.SUNRISEWEALTHADVISORS.COM](http://WWW.SUNRISEWEALTHADVISORS.COM)

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