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## **Cetera Announces New Relationship with Wilshire Associates, Sage and UBS to Expand its Advisory Platform**

**LOS ANGELES** – October 3, 2011 – Cetera Financial Group today formally announced a new relationship with Wilshire Associates, Sage Advisory Services, and UBS Global Asset Management. The relationships will allow Cetera to offer a new mutual fund/Exchange Traded Fund (ETF) advisory program that gives advisors and their clients access to institutional investment services, advice and active portfolio rebalancing, placing retail clients on a level playing field with large institutions.

Coupled with Cetera's industry-leading technology, the new program's flexibility allows advisors to assemble portfolios of models from the three strategists unified in a single custodial account. This allows advisors to help clients address tax, income and growth objectives while controlling investment risk and dramatically reducing paperwork for the client.

"Our advisors and their clients can now benefit from the institutional-level expertise brought by Wilshire, Sage and UBS. These firms are known for their strength with institutional investors and we are excited to make that expertise, discipline and insight available to our advisors and clients" said Barnaby Grist, executive vice president of wealth management at Cetera. "This program will help advisors spend less time on research, portfolio construction, monitoring, and periodic rebalancing, and will allow them to focus more on connecting with their clients and building their business, a cornerstone of the value Cetera brings to its advisors."

Within the new program, each strategist will provide overall asset allocation methodology, investment direction, research and ongoing due diligence. The asset allocation strategies for all three expand both traditional and alternative asset classes, and utilize both mutual funds and ETF vehicles.

"We took a unique approach when developing this platform: our advisors have complete discretion to allocate assets between models for each client rather than us defining it for them", said Grist. "We think this program, in combination with all of our wealth management services and technology, provides best-in-class investment models and solutions for our advisors and their clients."

The new program is powered by the recent expansion of Cetera's advisory technology platform, designed by FolioDynamix, and available through Cetera's SmartWorks<sup>™</sup> advisor workstation. This unique combination gives advisors unprecedented control in managing their fee-based business while increasing the efficiency and flexibility of their practice.

### **About Cetera Financial Group**

Cetera Financial Group provides comprehensive broker-dealer services, innovative technology, and robust advisory programs for approximately 5,000 independent financial professionals and nearly 700 financial institutions nationwide, through its three independently-managed broker-dealers: Financial Network Investment Corporation, Multi-Financial Securities Corporation, and PRIMEVEST Financial Services, Inc. With its multiple broker-dealer models, Cetera is able to offer the scale-driven benefits of a large broker-dealer with the customized solutions and personal relationship of a smaller firm.

Based in Los Angeles, Cetera is committed to empowering independent advisors to grow their business and become the trusted guide of their clients' financial future. For more information, visit [www.cetera.com](http://www.cetera.com).

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