

# A Strong Foundation Built from a Supportive Transition

Adam Rekasie, who has been a financial advisor for nearly 18 years, was looking for a new home committed to providing the best experience for financial professionals and their clients — ultimately leading him to Cetera Investors.

Rekasie was previously affiliated with Citizens Securities, Inc., bringing with him more than \$100 million in assets under administration as of January 30, 2023\*. “I was extremely interested in the availability of investment options, the ability to be more competitive in the fee environment, the independence, and lastly the online resources for my clients,” he explained.

## THOROUGH AND ATTENTIVE ONBOARDING SUPPORT

In Rekasie’s words, the onboarding process couldn’t have gone smoother. He credits his relationship to Jeff Russo, Branch Manager and Vice President for the Pittsburgh, Pennsylvania location, emphasizing that his support was pivotal to the successful transition. The two were in constant contact, touching base daily. “Jeff was always available if I had any questions or concerns,” Rekasie said. “I never felt lost or didn’t know where to find an answer.”

To promote this seamless transition, Russo ensured that Rekasie made the proper connections at Cetera’s home office. Rekasie praises Regional Training Specialist, Jason Berghold, for assisting with logistics and walking him through the various systems. Additionally, Steve Siepak, Internal Advisory Business Consultant, helped him navigate the money-managed platform — an area that was of specific importance. Rekasie also praised Growth and Engagement Manager Mary Jo Wallenstein for her attentiveness and assistance throughout the onboarding process.

In addition to home office support, the Pittsburgh branch prides itself on its welcoming and supportive environment, fully encompassing one of the cornerstones of the Cetera Investors — community. “Our culture and genuine appreciation for one another lives and breathes in the Western PA Branch,” Russo said. From the branch administrator to the advisors, various members of the Pennsylvania-based team have offered their support to Rekasie every step of the way.

## DESTINED FOR CONTINUED SUCCESS

Making the transition to Cetera presents the necessary tools and support to achieve tremendous growth. Rekasie described that, because of the support he has received from Cetera, he already has the time and ability to focus on his clients.

“I will be able to grow my business here because I will be a better advisor for my clients,” Rekasie said. This is just the beginning of his journey at Cetera.



**Adam Rekasie\*\***

Senior Financial Advisor  
Cetera Investors, Pittsburgh, PA



**Jeff Russo\*\***

Branch Manager and Vice President  
Cetera Investors, Pittsburgh, PA

## Learn How You Can Grow by Adding an Associate Financial Professional with Cetera Investors

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\*Value approximated based on asset holding details provided to Cetera up to January 30, 2023.

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