Betterment Advisor Solutions

Grow your RIA your way

with the all-in-one custodian purpose-built
for independent RIAs.

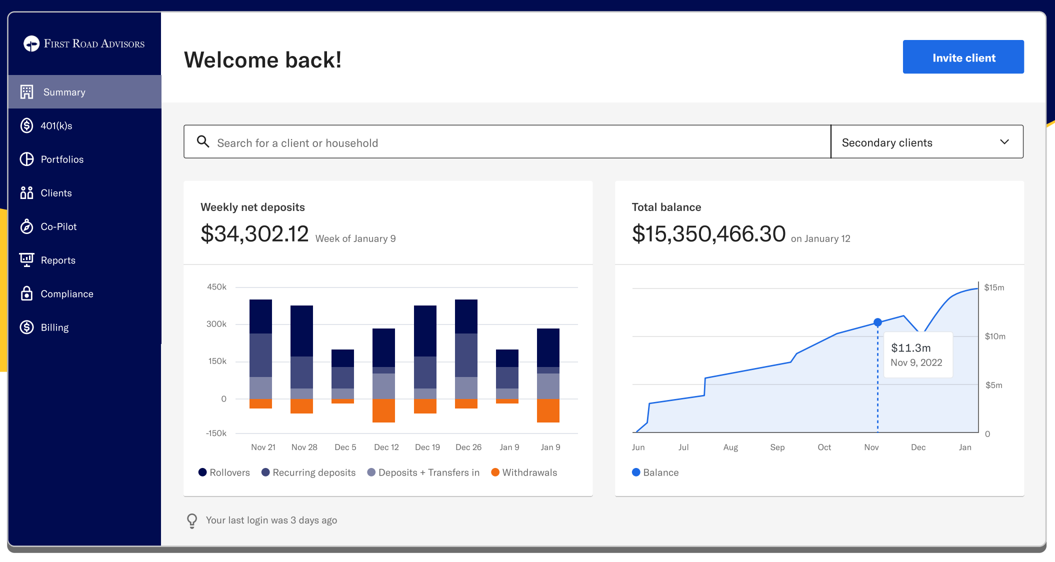
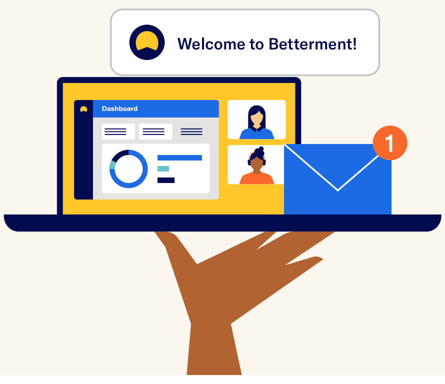


Image is for illustrative purposes

Paperless client onboarding

- Bundled account opening
- E-delivery of agreements
- Digital KYC
- No Docusign or physical signatures



Automated portfolio management

- Custom portfolio builder
- Access to Dimensional funds
- Model Marketplace, incorporating strategies from leading asset managers
- Drift-based rebalancing [1]
- Tax loss harvesting
- Asset location
- Dividend reinvestment
- Tax lot selection
- Fractional share investing
- Guided crypto portfolios with diversified exposure and rebalancing

Back-office support

- Dedicated relationship manager
- High-touch operations and client support teams
- Easy money movement with Transition Services team
- Co-pilot client task management interface
- Integrations with CRM, planning, and reporting tools

Set-it-and-forget-it billing

- Asset-based, tiered, and fixed-fee options
- Customizable billing plans by household
- Monthly or quarterly cadence
- No additional invoicing necessary

Seamless cash management

- High-yield cash account with competitive variable rate and up to $2M in FDIC insurance through our program banks [†]
- Option to bucket cash into multiple goals
- No-fee checking account [‡] with unlimited ATM fee reimbursement

Modern client portal

- Built-in performance reporting
- Electronic bank linking and transfers
- Digital ACATS transfers accepted from over 65 custodians
- Intuitive self-service tools
- Account aggregation
- Automated delivery of white-labeled documents (monthly statements, tax forms)
- Highly rated mobile app [§]

401(k) plans

- Streamlined solution where Betterment takes care of the 3(38) responsibilities
- Tech-forward option for plan administration
- Wide range of payroll integrations
- Easy, automated billing
- No plan minimums
- Ability to cross-sell participants into wealth management

Ready to take the next step? Learn more.

1 More information about drift-based rebalancing and associated minimums can be found at betterment.com/legal/portfolio-minimum

§ App store rating is as of 6.04.2024 and is based upon all ratings and reviews received since the Betterment app was launched September 10, 2010. Current rating can be found on Betterment's App Store listing and is subject to change. Rating is calculated and generated by the App Store® based on the average of all total app reviews. No compensation was exchanged for reviews or ratings. Rating may not be representative of the Betterment client experience, advisory services, or investment performance. For more information, see more reviews at the App Store and Google Play Store.

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‡Checking accounts and the Betterment Visa Debit Card provided and issued by nbkc bank, Member FDIC. Checking made available through Betterment Financial LLC. Neither Betterment Financial LLC, nor any of their affiliates, is a bank. Betterment Financial LLC reimburses ATM fees and the Visa® 1% foreign transaction fee worldwide, everywhere Visa is accepted.

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