Betterment
Advisor Solutions

Support that doesn't play favorites

While other custodians tier their support and overlook growing RIAs, we offer the same top-notch service to every partner, making sure your practice gets the attention it deserves.

Relationship managers

A dedicated partner to help with what matters most to you, including:

- **A dedicated point-of-contact:** Benefit from ongoing, accessible communication to help you resolve issues and take full advantage of our full suite of practice management features.
- **Account setup:** Onboard clients with hands-on support. Plus, leverage our white-labeled features to keep your firm front-and-center.
- **Firm strategy:** Get help with defining your market position, including building a value prop, defining service models, and segmenting for efficiency.
- **Practice management:** Streamline operations with expert guidance on leveraging our advanced portfolio management tools.
- **401(k) plans:** Work with our retirement specialists to offer an automated, low-cost 401(k) to clients.
- **Training and education:** Stay updated on our newest product upgrades, services, and industry developments.

Implementation team

Whether you're breaking away or an established RIA, our specialized transition team will guide your firm through a process that meets your unique timeline and demands.

- **Onboarding clients:** For bulk asset transfers, let our specialized team design, implement, and execute an efficient onboarding experience for all clients.
- **Asset transitions:** Streamline client transitions with customized plans, helping you define trading migration strategies for tax-efficient account transfers.
- **Client communications:** Get support with announcing your move to Betterment Advisor Solutions, and setting expectations with new clients during onboarding.
- **Transfer execution:** Get help with initiating and monitoring transfers, ensuring minimal work for you and your clients.

Support team

Get the answers you need in real time. Reach out via email or phone for human support with:

- **Platform features:** Engage our team to effectively leverage our cutting-edge technology, including tax-smart tools and custom portfolio-building resources, to meet your investment needs.
- **Operational tasks:** Access on-demand support for back office needs, including onboarding new clients, communications, and handling client inquiries.
- **Integrations:** Receive step-by-step guidance for setting up integrations, ensuring accurate data synchronization across systems.
- **Client data reports:** Request consolidated reports to ensure compliance with regulatory requirements and support routine audits.

98% of advisor calls

are answered within 2 minutes.*

Betterment LLC | 450 West 33rd Street, FL 11 New York, NY 10001 | (888) 646 - 2581 | bettermentadvisorsolutions.com

*Based on internal metrics for the Advisor Servicing Team, July 2023-June 2024