

## WE'RE YOUR AUTOMATED, GOALS-BASED WEALTH ADVISER

OPEN YOUR ACCOUNT

INVESTMENT PORTFOLIOS POWERED BY THE **3-D ENDOWMENT INVESTMENT PHILOSOPHY™**



## OUR GOAL IS TO EMPOWER YOU, THE INVESTOR, TO INTEGRATE YOUR PERSONAL INVESTMENT PLATFORM.

We have combined Betterment's automated technology platform with our 3-D Endowment Investment Philosophy and low-cost ETF models to bring you a personalized, goals-based wealth management solution.

OPEN YOUR ACCOUNT

### THE BENEFITS YOU WILL ENJOY

- Minimum Investment \$1
- No Transaction/Commissions Costs
- 0.60% (60 bps) asset-based fee
- Automated Rebalancing
- Tax Loss Harvesting Option

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to Cut Internet Cables



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CONTACT

Email: [service@MyRoboAdviser.com](mailto:service@MyRoboAdviser.com)  
Phone: (920) 785-6012

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