Digital investing and planning with a human touch.

OPEN AN ACCOUNT

LOGIN

WealthBuilder is a digital investing and planning solution based on your unique financial needs.

Book a complimentaty second opinion conversation with one of our Advisors

Schedule a Demo

(Call Length: 30 minutes)

– No account minimums
– No commissions
– Annual Fee: 0.65%

Fees based on account balance (billed quarterly based on assets under management in arrears)

EASY TO UNDERSTAND PERSONALIZED FINANCIAL ADVICE

Find out how much you can invest towards your goals, your recommended portfolio mix, and more

GLOBALLY DIVERSIFIED PORTFOLIOS

Investment portfolios chosen to maximize your potential return at various levels of risk across domestic and international markets

VARIED INVESTMENT THEMES

Traditional Asset allocation, Socially Responsible Investing, Smart Beta and Target Income strategies

GOALS BASED INVESTING

Retirement, College, Major Purchase

FREE FINANCIAL PLANNING TOOL

Sync external accounts to get a clear view of your money, and plan for your financial future

SUPPORT

Access to professional investment advice by an Account Manager along the way

Download our Monthly Portfolio Updates

Income

Conservative

Moderately Conservative

Moderate

Moderately Aggressive

Aggressive

Additional Investment Strategies

SOCIALLY RESPONSIBLE INVESTING

Learn More

TARGET INCOME ALLOCATION

Learn More

SMART BETA

Learn More

RetirementBuilder

Wondering how to manage your retirement accounts?

In today's markets, being passive with your retirement savings is no longer an option.

GET STARTED

PROFESSIONAL ADVICE

Personalized investment advisory services for certain accounts such as 401ks, 403bs, IRAs and annuities held away from our firm. With **RetirementBuilder**, we can help you manage your retirement accounts no matter where they are held using our multi-custodian trading platform.

MULTI-CUSTODIAN TRADING PLATFORM

With our trading platform, we can access your held away accounts on your behalf. The technology behind our trading platform enables our **Wealth Advisors** to trade, rebalance or reallocate your investments based on your financial goals, risk profile and time horizon.

TRANSPARENT FEE STRUCTURE

We don't charge commissions. The fee for **RetirementBuilder** is consistent with MRA's Private Wealth Advice Program in which clients pay an annual investment advisory fee ranging from 0.40% to 1.50% based on assets under management.

FLEXIBILITY

No long-term commitments. Start or cancel the service at any time.

Upgrade. Get more than investment advice!

Private Wealth Advice

LEARN MORE

Subscriptions based fee starting at $49/month

DEDICATED WEALTH ADVISOR

From the simplistic to the highly complex financial situations, MRA Advisory Group (MRA) offers customized subscriptions services for financial planning and/or tax advice for an additional fee

COMPREHENSIVE GUIDANCE

Advice on life events: retirement planning, retirement income, large purchases, college, estate planning, tax strategies, stock options, insurance planning

ADVICE ON THE WHOLE PICTURE

Get advice on outside investments such as 401ks, 403bs, stocks, stock options, and alternative investments

TAX PREPARATION AND PLANNING

Personal and/or business tax preparation and planning by in-house CPA*

** Services offered by afilliated MRA Tax Services, LLC.*

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WealthBuilder Investing offfers flexible and easy to use platform

PAPERLESS ACCOUNT OPENING

Paperless account opening and transfers with just a few clicks.

AUTO DEPOSIT AND TRANSFERS

AUTO DEPOSIT AND TRANSFERS

Automate your investment savings and transfers from external accounts

NO FEES TO BUY OR SELL

No additional fees to buy or sell securities in your portfolios

PORTFOLIO REBALANCING

We rebalance your portfolio quarterly at no additional cost to you

View ADV Brochure for additional Information

Start investing today. No minimums.

GET STARTED TODAY

About WealthBuilder Investing

Offered by MRA Advisory Group (“MRA”)

As a robust digital investing tool, **WealthBuilder Investing** helps MRA deliver on its mission:

***Simplify financial services across generations*.**

Learn More at mraadvisory.com

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