

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 complimentary 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

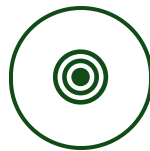
Aggressive

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 affiliated MRA Tax Services, LLC.*

Download our Mobile App

Search: Betterment



WealthBuilder Investing offers flexible and easy to use platform



PAPERLESS ACCOUNT OPENING

Paperless account opening and transfers with just a few clicks.



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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WealthBuilder Investing

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