

Backend Benchmarking

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Backend Benchmarking's mission is to empower individual investors to improve their portfolios by providing unbiased insights, actionable advice, and peer comparisons.

About Backend Benchmarking

At Backend Benchmarking, we see a flaw in the wealth management industry. There is a serious lack of trust and transparency between investors and financial advisors.

In fact, 62% of affluent investors do not “have trust in the financial investment community.”¹ This lack of trust is not unfounded; a National Bureau of Economic Research study shows that advisors encourage investor behavior that generate more fees.²

Investors lack an independent, transparent source of information where they can see how their portfolio compares to other investors' with similar goals, income levels, and demographics.

Whether it's performance, fees, or planning for their financial future, there is no central hub where individuals can view their entire portfolio in a single location, receive institutional-quality analysis on their holdings, and gauge how their portfolios are doing relative to others.

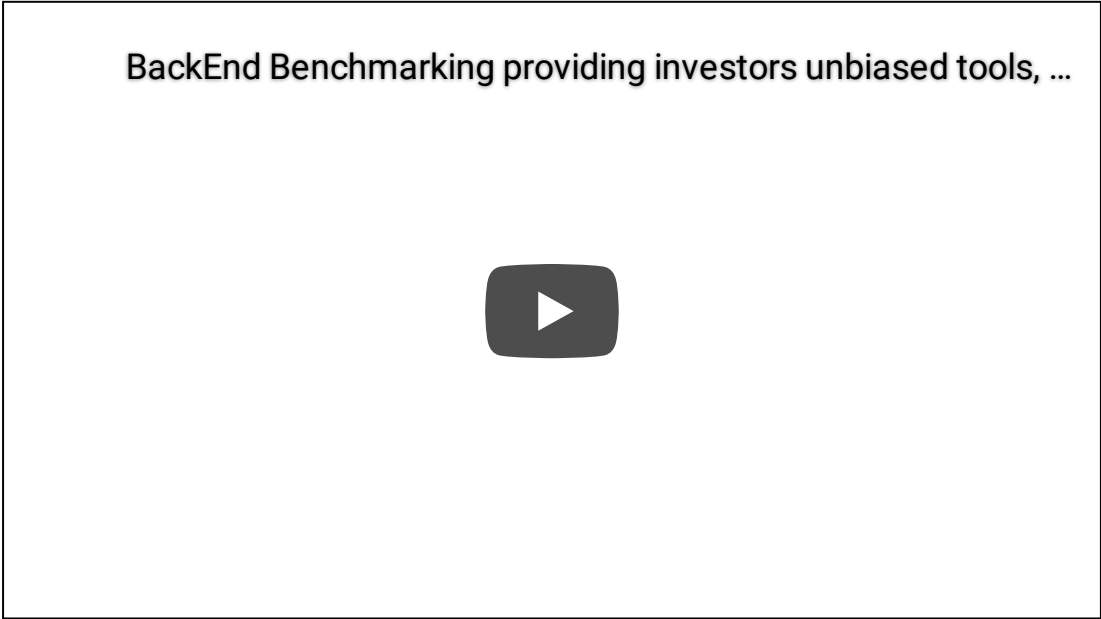
Backend Benchmarking is building a world-class platform that will provide a consolidated view and holistic analysis of a user's entire financial picture, and will also deliver actionable advice and practical next steps, guiding users to optimize their portfolios and personal finances.

Insights and advice will be based on real data from users' portfolios. By connecting users' actual accounts to the platform, information will be automatically updated on the system, enabling personalized advice specific to the investor's real-time financial situation. These data-driven insights and advice are at the core of the platform's value proposition.

Backend Benchmarking's goal is to crowdsource real account data to empower people to make better investment decisions.

Currently, we publish The Robo Report™ (/the-robo-report/), which benchmarks the largest and most popular Robo Advisors. We also publish The Robo Ranking™ (/robo-ranking/) semiannually, which ranks every Robo Advisor against their competitors based on their quantitative metrics like performance and fees, as well as their qualitative features and services, like financial planning tools, access to live advisors, customer experience and more. We plan to expand our analysis to other financial products to bring transparency to all corners of the investment world.


By giving investors unbiased tools, like The Robo Report™, The Robo Ranking™ , and the Backend Benchmarking platform, we empower them to make better decisions for their financial futures.



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¹ Cogent Wealth Reports. (2014, May). *The Self-Directed Investor™ Uncovering Opportunities in the Self-Directed Marketplace*.

² Mullainathan, S., Noeth, M., & Schoar, A. (2012). The Market for Financial Advice: An Audit Study. *The National Bureau of Economic Research*. doi:10.3386/w17929

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