

Marstone

[HOME \(/#HOME-SECTION\)](#)

[OUR PLATFORM \(/#OUR-PLATFORM-SECTION\)](#)

[WAYS TO PARTNER \(/#WAYS-PARTNER-SECTION\)](#)

[ABOUT US \(/#ABOUT-US-SECTION\)](#)

[IN THE PRESS \(/#PRESS-SECTION\)](#)

[CONTACT \(/#CONTACT-SECTION\)](#)

**The new era of
investing is
here.**

Trusted. Flexible. Seamless.

Marstone improves your bottom line and helps you to meet your customers where they are. Our mission is to enhance financial literacy, deepen financial inclusion, and humanize finance for all by enabling organizations to easily offer digital wealth solutions. Powered by Marstone™, our enterprise-ready solution, is the proven way for financial institutions to efficiently and affordably reach, acquire, and retain clients who seek straightforward information and engagement around their finances.

Partnering with the best.

BlackRock



BNY MELLON

PERSHING

fiserv.

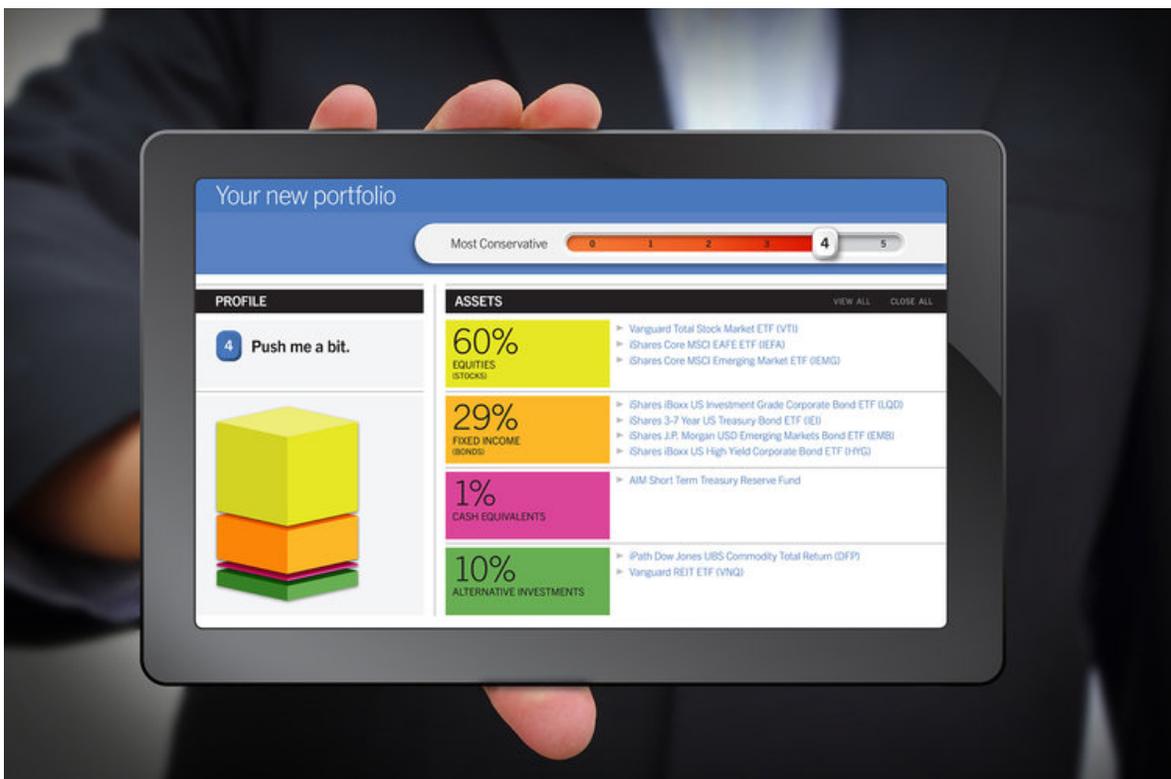


HSBC



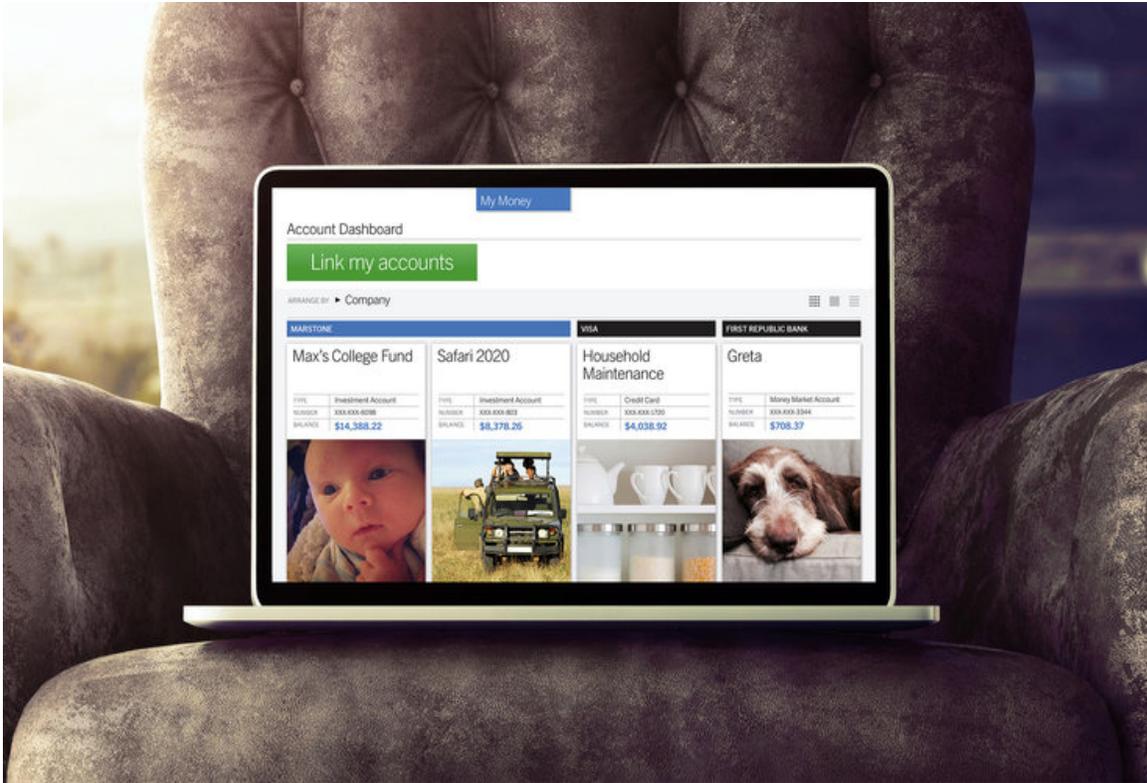
InteractiveBrokers

FEATURES OF OUR PLATFORM



Flexible, Personalized Portfolios

Smart investing isn't one size fits all, so we allow end investors to build a personalized portfolio based on their own goals, beliefs, and interests. After investors are guided through a few simple questions, our algorithms gauge their timing and risk tolerance to create an appropriate portfolio. Individual portfolios are then built and presented using our curated selection of exchange-traded funds, your own institution's models, or models offered by our partners including BlackRock.



The Complete Financial Picture

Investments are typically just one piece of an end investor's overall financial picture. We offer aggregation tools to link accounts held outside of Marstone, displaying everything in a unified and customizable dashboard. Our personalization tools offer customers an unprecedented level of control over their online experience, helping them learn and grow their financial understanding.

INTEGRATE SEAMLESSLY.

Fully digital, and ready for customization, our automated workflow processes and integrated systems are designed to enable greater operational efficiency for your team.



CORE AGNOSTIC

Our core-agnostic technology sits on top of your firm's existing infrastructure, allowing for faster integration and a seamless user experience.



FLEXIBLE MODEL MANAGEMENT

We provide a range of wealth management solutions at your fingertips. You can use your own financial models, or leverage ones from our partners such as BlackRock.



TESTED AND SECURE

The Powered by Marstone platform has been verified by CA Technologies Veracode, so security is baked in.



AUTOMATED AND CUSTOMIZABLE

Our automated workflow processes and interactive reporting tools can be customized with different metrics and benchmarks, allowing you to generate summaries of accounts and advisors' books.



ONE PLATFORM, THREE WAYS TO PARTNER

From local credit unions, to investment shops to multinational banks, every institution is unique. We offer several engagement models to meet your needs, no matter how complex. If you don't see your type of institution listed, or if you're curious about custom features, [contact us](mailto:info@marstone.com) (mailto:info@marstone.com).

1 Marstone as your
Sub-Advisor

DESIGNED FOR:

RIAs
Broker-dealers

2 Marstone as your
Technology
Partner

DESIGNED FOR:

Institutional Investors
Investment Firms

3 Marstone as your
RIA

DESIGNED FOR:

Qualified banks and credit
unions with no

BENEFITS:

A turn-key solution in which our SEC-regulated RIA acts in a sub-advisory capacity for the day-to-day management of your accounts, including trading and rebalancing

Leverage Marstone's model-tested portfolios or use models from our third-party partners, including BlackRock

Clients access your investing platform through your company's own branded website

Wealth Management Firms

Banks with wealth management capabilities

BENEFITS:

Use your proprietary risk-tolerance questionnaire and model portfolios, including asset classes and securities

Conduct day-to-day account management for your clients leveraging your business's existing custodial and technology frameworks

Clients access your investing platform as part of your company's own branded website

wealth offering

Insurance companies with no wealth offering

BENEFITS:

Allows you to assist clients in finding investment advisory solutions through Marstone's digital offerings

Our SEC-regulated RIA provides advisory services for your clients through our softbranded platform

Your clients are automatically linked to a separate Marstone-hosted website for their investing experience, and your company's logo is displayed as the referring institution

REQUEST A DEMO (MAILTO:INFO@MARSTONE.COM)

ABOUT US

Marstone is an ensemble of experienced designers, technologists, storytellers, and wealth management practitioners who came together to develop a new breed of financial tools and investment solutions that are intuitive, useful, and relevant for everyone. We innovate in

collaboration with clients and vendors, big and small, enabling them to reach and engage every current and prospective investor.



Margaret J. Hartigan

CHIEF EXECUTIVE OFFICER
AND FOUNDER

Inspired to demystify finance for everyone, Margaret founded Marstone. Formerly a top-quintile financial advisor for 10 years in the Global Wealth Management Group at Merrill Lynch, she is an active leader in the alumni and major development efforts at both Brown University and Phillips Exeter Academy. She's a member of the Milken FinTech Advisory Committee.



Robert Stone

CHIEF CREATIVE OFFICER
AND CO-FOUNDER

Knowing that meaningful products and successful companies are built through exceptional user experiences and constant innovation, Robert teamed with Margaret to create a new kind of financial services firm. A co-founder of Stone Yamashita Partners, he has been a creative director for more than 30 years and is a graduate of the Art Center College of Design.

Board of Directors

CHAIRMAN

PETER KRAUS

Chairman and CEO, Aperture Investors

Advisors

KATHERINE CALVERT

Chief Marketing Officer, Lithium Technologies

Former Chairman and CEO, AllianceBernstein

THOMAS E. FREEMAN

Former Executive Vice President, SunTrust

MEMBERS

TRACY KILLOREN CHADWELL

Founding Partner, 1843 Capital

KRISTEN DICKEY

Former Managing Director, BlackRock

MARGARET J. HARTIGAN

CEO and Founder, Marstone Inc.

MICHAEL RAFFERTY

CEO, Rafferty Holdings, LLC

RICHARD WASTCOAT

Former Managing Director, Fidelity International

JOHN LIFTIN

Former General Counsel and Managing Director, The D.E. Shaw Group

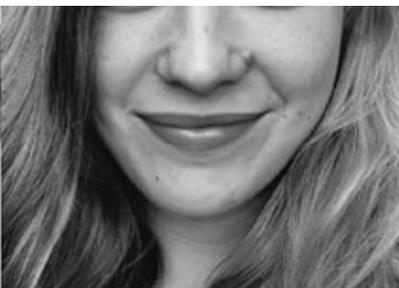
SETH MASTERS

Former CIO, AllianceBernstein - Bernstein Private Wealth Management

KELSEY WEAVER

Founder, Impact Innovation and Former Publisher, *Bank Director*





IN THE PRESS

Interested in reporting on Marstone? We'd love to tell you more about how our digital advice platform is working for our customers and their clients.

MEDIA INQUIRIES ([MAILTO:PRESS@MARSTONE.COM](mailto:PRESS@MARSTONE.COM))

COMMERCE STREET
Capital

Industry Leaders Meet at Commerce Street Capital's Annual Banking Conference

(<https://www.prnewswire.com/news-releases/industry-leaders-meet-at-commerce-street-capitals-annual-banking-conference-300838374.html>)

APR 29, 2019



Marstone Announces Board of Directors Led By Peter Kraus (<https://www.businesswire.com/news/home/20190207005205/en>)

FEB 7, 2019



When Androids Dream of Electric Piggy Banks: In 2044, Ubiquitous Online Wealth Management Will Be the Norm (<https://www.wealthmanagement.com/industry/when-androids-dream-electric-piggy-banks>)

FEB 6, 2019

Marstone Announces Partnership with World Economic Forum's Centre for the Fourth Industrial Revolution
(<https://www.globalbankingandfinance.com/marstone-announces-partnership-with-world-economic-forums-centre-for-the-fourth-industrial-revolution/>)

JAN 16, 2019

Marstone and Interactive Brokers Are Latest "Digital Dance Partners"
(<https://www.wealthmanagement.com/technology/marstone-and-interactive-brokers-are-latest-digital-dance-partners>)

JAN 9, 2019



Marstone Adds BlackRock Model Portfolios to Platform

(<https://www.wealthmanagement.com/technology/marstone-adds-blackrock-model-portfolios-platform>)

OCT 31, 2018



HSBC launching robo-adviser to expand wealth management footprint

(<https://www.investmentnews.com/article/20181017/FREE/181019927/hsbc-launching-robo-adviser-to-expand-wealth-management-footprint>)

OCT 17, 2018

[BROWSE ALL NEWS \(/ALL-NEWS\)](/ALL-NEWS)

INDUSTRY AWARDS AND CERTIFICATIONS



CONTACT US

Have a question about partnering with us? Curious to see a demo of our platform? Email info@marstone.com (mailto:info@marstone.com) and we'll be in touch soon.

(http (h'ip (http

[PRIVACY POLICY \(/PRIVACY\)](#) [CAREERS \(/CAREERS\)](#) [BLOG \(/BLOG\)](#)

© 2019 Marstone, Inc. All Rights Reserved. Marstone and the Marstone logo are trademarks of Marstone, Inc. Patent Pending