



(<https://wealthstep.com>)



Your goals, saving and investing made simple

[LEARN MORE \(HTTPS://WEALTHSTEP.COM/WHATWHY/\)](https://wealthstep.com/whatwhy/)

This is beta version. Request a beta invitation:

SEND

Have an invitation? [Click here \(https://wealthstep.com/sign-up/\)](https://wealthstep.com/sign-up/).

WealthStep guides you through the keys to financial independence



Focused on what matters

Use WealthStep's proven Aim>Save>Invest>Spend process to accomplish your goals



The best of both worlds

An automated planning and investment service focused on goals, action & patience



Guidance and monitoring

Clear advice, action reminders, learning videos & reports. Basic & 401k version free!

WealthStep is for you if you:

- ✔ Need help knowing how much to save and how to invest
- ✔ Don't want to feel intimidated by financial matters
- ✔ Know you can be successful with good guidance

- ✔ Value advice driven by experts + algorithms
- ✔ Need proactive reminders and video tips
- ✔ Want the option of a human advisor in the future

The basic version is free! If you prefer to also have human advice, [learn about options](#) (<https://wealthstep.com/whatwhy/>). If you're a 401k/retirement plan fiduciary, click here (</fiduciaries/>).

Let's get started

[LEARN MORE \(HTTPS://WEALTHSTEP.COM/WHATWHY/\)](https://wealthstep.com/whatwhy/)

[TRY IT \(HTTPS://WEALTHSTEP.COM/SIGN-UP/\)](https://wealthstep.com/sign-up/)

Latest News

Make yourself and future generations of retirement savers into “super savers”
<https://wealthstep.com/make-yourself-and-future-generations-of-retirement-savers-into-super-savers/>

2019 Posted by Wealthstep

As part of Financial Literacy Month, which led to a flurry of articles about the retirement crisis in the U.S. One piece noted that the “average” retirement savings amount, paltry though it is, is often an overstated...

[LEARN MORE \(HTTPS://WEALTHSTEP.COM/MAKE-YOURSELF-AND-FUTURE-GENERATIONS-OF-RETIREMENT-SAVERS-INTO-SUPER-SAVERS/\)](https://wealthstep.com/make-yourself-and-future-generations-of-retirement-savers-into-super-savers/)

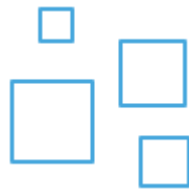
2018 Quarterly Context Webinar (<https://wealthstep.com/q4-2018-quarterly-context-webinar/>)

he stock market cooling? Why and how many investors fail to do what disciplined/experienced investors do. People are s
onfident about the future, but less so. Is your debt shrinking as a...

IORE (HTTPS://WEALTHSTEP.COM/Q4-2018-QUARTERLY-CONTEXT-WEBINAR/)

4
TwitterFeeds ai_username=" ai_numberoftweets='3' ai_tweet_title='Financial Literacy Tweets']

Benefits



Know how much to save



Goal-shaping advice



Make smart prioritized decisions



Diversified & tax-efficient investing



Free or low-Cost, no hidden fees



More relaxed with goals on track

Why WealthStep – Because great fiduciaries care
(/whatwhy/)

[LEARN MORE \(/FIDUCIARIES/\)](/fiduciaries/)



(<https://wealthstep.com/wp-content/uploads/2013/09/Mohsin.png>)

WealthStep gives back

For each new user, WealthStep will donate time to financial literacy education for kids and parents in underprivileged & other areas.

Want a presentation at your school? Join the waitlist (<https://wealthstep.com/contact/>). Want a retirement preparation presentation at your company? Contact us (<https://wealthstep.com/contact/>).

The truth you need to know

72%

Most aren't on track to retire, especially when factoring in health care costs

68%

Many don't even know they're not on track to retire

2%

Emotional investing can harm results yearly

\$6340

Is the 2017 average pre-tax monthly Social Security payment enough?

Learn more about these statistics (<https://wealthstep.com/faq/#question-93>)

How ready are you?

See how much you need for financial freedom

If you save this much by age 65:

\$

500,000

You might be able to spend this monthly in retirement:

\$1,667

Learn about the “4% rule” (<https://wealthstep.com/faq/#question-39>) estimation. Before taxes and excludes any Social Security.

Managing over

\$860,000,000

Technology-driven by

EXPERIENCED ADVISORS

[FAQ \(https://wealthstep.com/faq/\)](https://wealthstep.com/faq/)

[Terms & Conditions \(/privacy-ethics-disclosures-terms/\)](/privacy-ethics-disclosures-terms/)

[Privacy Policy \(/privacy-ethics-disclosures-terms/\)](/privacy-ethics-disclosures-terms/)

WealthStep and its parent company, The Advisory Group (a SEC Registered Investment Advisor), advise a combined total of over \$860,000,000 of personal wealth, 401(k) accounts, and other assets.

© 2019 WealthStep. All rights reserved.