

Your Investment Journey Awaits

Digital investment advice which keeps you on the right financial path.

Click the button to get started today.

Institutional Intelligent Portfolios®

Our mission is simple. To empower financial peace of mind through technology and expert advice.

You invest for a reason. You may be planning for your retirement, or investing for a child's education, or a home – or something else altogether. Every goal requires its own plan and strategy. TDC Now is designed to help you do just that. With innovative technology backed by a team of experienced professionals, TDC Now is built to align your wealth and goals.


Automated Rebalancing

Our technology monitors and rebalances keep you diversified and on track.

[View important information ab](#)

Tax Efficiency

If an investment declines in value, our automatic harvesting can help you offset the taxes c

[View important information ab harvesting.](#) 

A Range of Accounts Availa

We offer several options, including broker trust accounts.

[+ More information](#)

We Make Investing Easier

Our investing experience is built on three key components:

1

UNDERSTAND

You complete a short questionnaire based on your goals, risk tolerance, and timeline

2

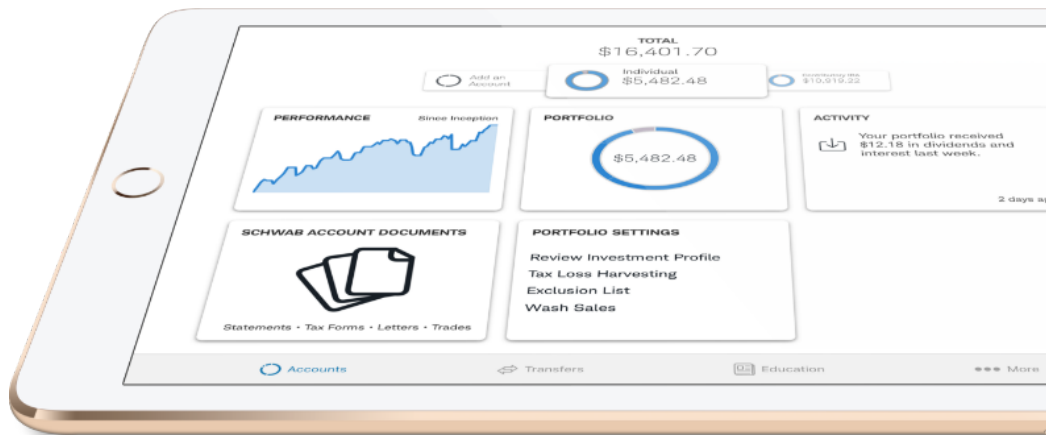
BUILD

We build you a diversified portfolio of ETFs.

3

MONITOR

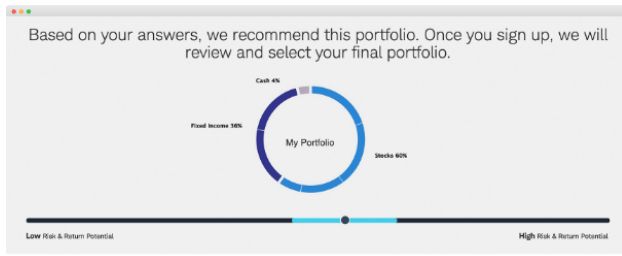
We monitor your portfolio daily, and automatically rebalance it when needed



Don't wait. Start your investing journey now.

Click the button to get started today.

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Asset Allocations

PROPOSED ALLOCATION selected for details

Stocks	60%	Fixed Income	36%
International Market Equity	20%	Investment Grade Municipal Bonds	18%
US Market Equity	19.8%	Investment Grade Short Term Municipal Bonds	18%
US Small Value Stocks	13.2%		
International Emerging Market Stocks	7%		
Cash	4%		

WHY WE'RE HERE

To Help You Optimize and Grow Your Wealth

TDC Now utilizes investment strategy research aiming to capture small, value premiums which evidence supports over the long term and uses technology to rebalance your portfolio. Together, we can strive to help you reach your long-term goals.

SEEING IS BELIEVING

Powerful Financial Planning Tools Keep Your Investments On Track Toward Your Goals

TDC Now integrates our foundational research giving us the ability to show you in real-time how to invest for retirement, save for a vacation, or long-term wealth striving to help you turn your goals into a reality.

ACCESS TO EXPERIENCED ADVICE

We're Here For All Life's Moments

TDC Now creates a bionic investment experience by combining technology efficiency with a real-life adviser, helping to keep your unique financial needs and goals on track.

Access to a Carefully Constructed, Globally Diversified Portfolio

TDC Now utilizes investment strategies predicated on research aiming to capture small, value, and growth opportunities, which evidence supports exist over the long term and uses technology to rebalance and monitor. Together, we can strive to help you get closer to reaching your long-term goals.

Stock ETFs

Your portfolio may include stock ETFs representing the broad U.S., international developed, and emerging stock markets. You will be invested in thousands of companies by owning just a few ETFs. The amount of stock exposure in your portfolio will be determined by the portfolio allocation determined by you and your adviser. Your stock ETFs include the following asset classes:

Stocks

Bond ETFs

Your portfolio may include bond ETFs representing high credit quality U.S. or U.S. municipal bonds, depending on the type of account you have and your needs. The amount of bond exposure in your portfolio will be determined by the portfolio allocation determined by you and your adviser. Your bond ETFs include the following asset classes:

Bonds

U.S. Market Equity

U.S. Market Equity contains broad exposure to the U.S. stock market.

U.S. Investment Grade Intermediat

U.S. Investment Grade Intermediate Bon exposure to high credit quality US bonds average maturities.

Still Not Sure?

If you want to dig a little deeper before making a decision, we understand. Take a into the thinking behind our approach.

What is the minimum amount required to open an account?

You can open a TDC Now account with a minimum of \$5,000.

What do I do when I professional advice?

You can contact your TDC Now at 419.891.9999, or email us at tdcnow@tdccompanies.com and respond within 24 hours.

What is rebalancing? ⓘ

Every portfolio has a target asset allocation that has

Is my TDC Now acc secure?

been determined by your adviser. Over time, however, contributions/withdrawals, gains, and losses cause your portfolio to stray from the original target, and it can become unbalanced. Rebalancing is the act of periodically buying or selling assets to restore your portfolio to its target allocations. TDC Now portfolios rebalance automatically, with no transaction costs, thanks to an algorithm that adjusts your account when an asset class shifts a certain amount above or below the target range set by your adviser.

Charles Schwab and Co., Inc. will help you get started. If you are asked to open an account with Charles Schwab and Co., Inc. simply follow the instructions during the account open process, and if you already have a Charles Schwab and Co., Inc. client account, you can use your existing account credentials to complete enrollment even faster.

Have more questions? Visit our Frequently Asked Questions page for answers.

FAQs

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