

Robo Advisor Transcript

Are you looking to start investing or change your current investment strategy?

Do you like the idea of 24/7 online access to your accounts, but also want online access to a human financial advisor?

Guided Wealth Portfolios could be a good solution for you.

Guided Wealth Portfolios or (GWP), can help you invest for your future today by combining digital technology with a personal one on one relationship with a financial advisor.

Unlike many other Robo Advisors solutions that require a high starting investment amount if you'd like an advisor relationship, GWP gives you access to an individual financial advisor for a beginning investment of only \$5,000 dollars.

This means you can call your advisor if you have a question about your investments, while still enjoying easy online access to your accounts.

GWP also presents expanded opportunities to help you build toward your financial goals.

You receive an investment portfolio designed specifically for your place in life and financial objectives, filled with lower cost funds, and built by experienced professional money managers.

The GWP algorithm places your money in a smart tax-efficient way and analyzes your account on a daily basis for opportunities to potentially reduce your taxes and update your portfolio to keep it in line with your goals.

To help GWP and your advisor determine the right strategy for you, you'll go to GWP and provide some basic information about you, your goals, and your preferred investment style.

You can also link any existing accounts or enter how much you'd like to invest to get a personalized proposal.

To learn more and get your personalized proposal, contact your financial advisor today!