Digital Investing Through Guided Wealth Portfolios

Online investing, personalized for you

Guided Wealth Portfolios is our digital investing solution that allows you to invest online with a low starting minimum and low-cost, exchange-traded funds (ETFs) while working with a personal financial advisor. Whereas other, similar solutions, called “robo advisors,” often require a large investment amount before granting access to a dedicated financial advisor, our solution allows you to start with only $5,000.*

What You Get

With Guided Wealth Portfolios, you get a diversified portfolio personalized for you and your individual investment goals. Guided Wealth Portfolios is an innovative way to invest for your future, whether you want to invest for retirement or a major purchase like a new home—or simply want to get your money in the markets so it’s not sitting idle. You’ll also get to build a relationship with a financial advisor and engage with a personalized, online dashboard that shows you how your account is doing along the way.

To see if Guided Wealth Portfolios could be the right investing solution for you, click on the link below, where you can answer a few brief questions about your goals and receive a personalized proposal.

Get Your Personalized Proposal to See If Guided Wealth Portfolios Is Right for You

How It Works

1. Provide an email address and choose a password so your information is protected.
2. Answer a few simple questions to tell us a little bit about you, so we can determine what your portfolio should be.
3. Answer some questions about how you feel about taking on risk when investing, so we can determine your investment preferences.
4. Get a personalized portfolio that outlines our recommended investment strategy and how much you could potentially earn through Guided Wealth Portfolios.

If you like your Guided Wealth Portfolios proposal and want to begin working with a financial advisor while enjoying the convenience of online investing, you can choose to open an account immediately. You’ll have the option to transfer an existing investment account or fund your account with cash—it’s just that easy.

We implement your personal portfolio using proven diversification techniques and sophisticated algorithms. You’ll receive allocations designed for you and your savings goals, and benefit from trading techniques that can help reduce taxes. Your portfolio is monitored daily, keeping it on track as markets move, and rebalancing it as needed.

Get Started: View Your Personalized Proposal to See if Guided Wealth Portfolios Is Right for You

*An annual small account fee is applied to accounts with less than $10,000 invested. Additional fees will apply.

IMPORTANT: The projections or other information generated by Guided Wealth Portfolios regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.

Guided Wealth Portfolios (GWP) is a centrally managed, algorithm-based, investment program sponsored by LPL Financial LLC (LPL). GWP uses proprietary, automated, computer algorithms of FutureAdvisor to generate investment recommendations based upon model portfolios constructed by LPL. FutureAdvisor and LPL are nonaffiliated entities

If you are receiving advisory services in GWP from a separately registered investment advisor firm other than LPL or FutureAdvisor, LPL and FutureAdvisor are not affiliates of such advisor. Both LPL and FutureAdvisor are investment advisors registered with the U.S. Securities and Exchange Commission.

All investing involves risk including loss of principal. No strategy assures success or protects against loss. There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk.

References to tax strategies that the GWP service investment management considers in managing accounts should not be confused with tax advice. LPL Financial does not provide tax advice. Clients should consult with their personal tax advisors regarding the tax consequences of investing.