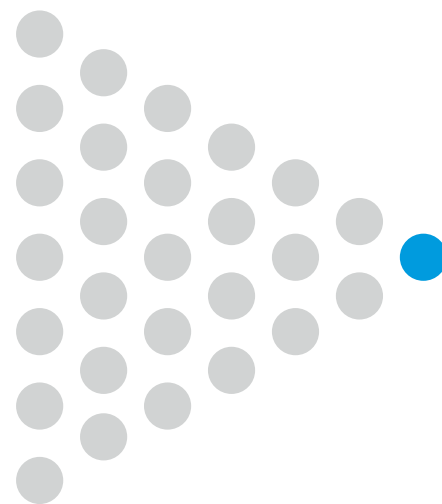
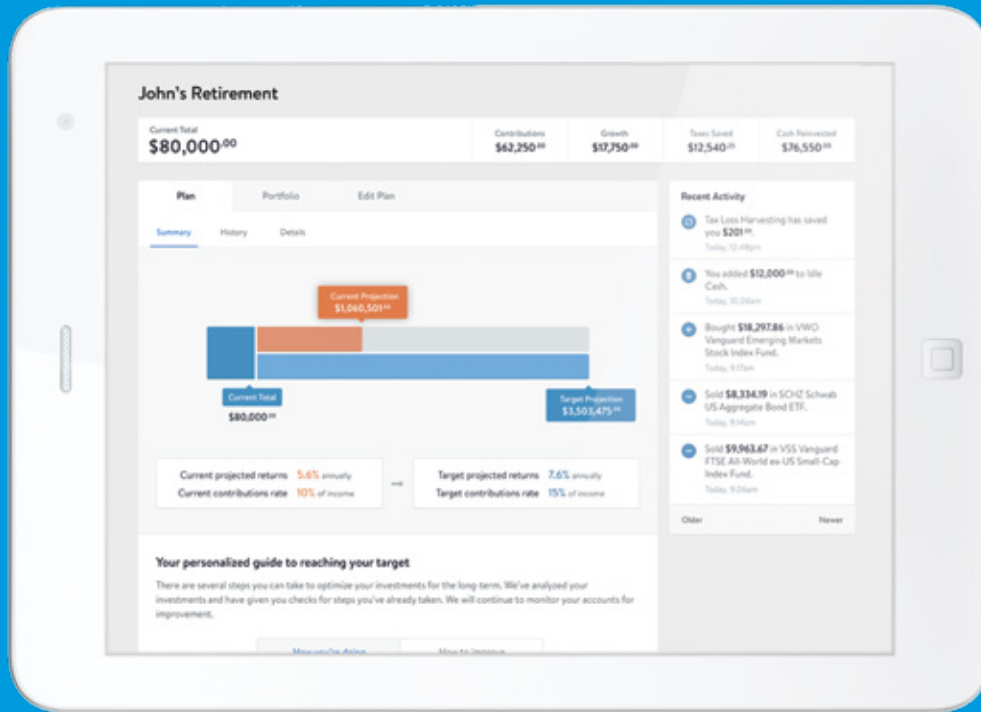


# GUIDED WEALTH PORTFOLIOS

Start investing for your future today



Invest for your future with our new online platform that combines the benefits of a personal financial advisor with sophisticated technology.



[View our Tax Advice](#)
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# TECHNOLOGY + ADVISOR

You still get your advisor's experience and expertise, but with the added convenience and transparency of an automated investing solution. Guided Wealth Portfolios provides you personalized, objective investment advice through an online platform with 24/7 access to your accounts.



While other digital investing solutions, or robo advisors, offer online investment management, most don't include a direct personal relationship with a dedicated financial advisor. With Guided Wealth Portfolios, you get a personal advisor, dedicated

to you and your goals, helping to guide you through the investing process.

Our Guided Wealth Portfolios platform offers:

## **Personalized planning, service, and advice**

The path to your financial goals is personalized for your specific stage in life, and it will change as your life changes. If you ever have any questions, your advisor is only a phone call away.

## **Intuitive, intelligent technology**

See your accounts in one place, open new accounts, view your portfolio, and make updates via your personal portal. The technology makes the process fast and easy.

## **Advanced wealth management**

We can implement your personal roadmap using proven investment techniques. Receive allocations designed for you and your savings goals, and benefit from trading techniques that may increase diversification and can help reduce taxes. Whatever your retirement goals, we can help you.



# INTELLIGENT INVESTING

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Guided Wealth Portfolios offers investment management designed to help you pursue your financial objectives. By investing with us, you receive:

- **Personalized roadmap**—Based on your goals, investing time horizon, and risk preferences, you'll receive an investment allocation and roadmap designed to help you pursue your objectives. As you get closer to retirement, your allocations will gradually change.
- **Holistic advice**—By considering your retirement objectives and investments, our analysis allows you to work toward your investment goals.
- **Tax-efficient investing**—Through advanced asset analysis, we'll allocate your assets in a tax-efficient manner and evaluate the tax impact of each trade before it goes through.
- **Consistent monitoring**—Your portfolio is monitored daily, keeping it on track as markets move and rebalancing it as needed.
- **Tax-loss harvesting**—If an investment experiences a loss, we may sell it to offset taxable gains in your portfolio. The investments sold are replaced by similar investments to maintain your asset allocation, so you get tax benefits while keeping a properly diversified portfolio.
- **Financial advice**—We're available any time you have a question about your account or investing strategy.



# SEE YOUR PROPOSAL

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Before opening an account, you can get a proposal that shows you sample recommendations for your portfolio and what you could potentially accomplish with Guided Wealth Portfolios. To get started, we'll take you through three easy steps:

1. **Tell us about you.** Tell us the story of your investing time horizon, style, and goals. We want to develop an investing strategy just right for you.
2. **Link your investment accounts.** Let us know what you've currently saved or invested. This will help us give you a holistic view of your investment accounts and better understand how to best build your portfolio. Our proprietary software links directly to your existing accounts, so the sample recommendations match up exactly to your holdings.
3. **Get an immediate analysis.** Guided Wealth Portfolios analyzes the account information you provide. Our proprietary algorithm's sample recommendations help you understand what to keep, what to change, and why.

When you're ready to open an account, Guided Wealth Portfolios will put your plan into action, monitor your investments daily, and take strategic action when markets shift to help you pursue your long-term goals.

**To learn more about Guided Wealth Portfolios, contact your advisor today.**



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 Guided Wealth Portfolios 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.



# START TODAY

To learn more about Guided Wealth Portfolios, contact your advisor today.

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Not Insured by any Federal Government Agency		Not a Bank Deposit