MY ROBO ADVISER™

Committed to Building Your Sustainable Wealth

How to Open a Trust Account at MyRoboAdviser.com

Setting up a Trust account is quick and can be done entirely online. Clients can have both a personal account and multiple trust accounts that can be accessed from a single login.

How to Establish a Trust Account

To add a Trust account, you must be the trustee of the trust entity. As a trustee, you will first need to sign up for a personal account. Start by going to www.MyRoboAdviser.com, click on the “*Open an Account*” tab. You will then be directed to the website of Betterment for Advisors, the technology partner for My Robo Adviser to initiate the account opening process.

Once you have established your personal account and are logged in, the following can help you set up your Trust account:

- Click “Add New” (Left side of page with the plus symbol)
- Select “**Invest in a diversified portfolio**”, then “Continue” at bottom and continue by selecting “**Safety Net**”, then “Continue” again.
- Now select “**Trust**” radio button, then click “Continue”.
- Is the Trust a U.S. Domestic Trust? Y/N (*only U.S. domestic trusts can be accepted*)
- Enter details (legal Name of the Trust, the Nickname or short name (how it will show up on statements, etc.), State of Organization, Date established, Taxpayer ID type (EIN/SSN), Address, City, State, Zip, then “Continue”
- Acknowledge account opening agreements by checking the box
- Upload the required pages of your Trust document*. You do not have to upload a copy of your entire trust agreement. You need to provide electronic copies of the only following pages:
    - The title page which generally contains the trust’s title, TIN, date of establishment and the state of organization
    - The signature page(s), which contain the signatures of all authorized trustees.

  **Note- Be sure provide only pages from your original Trust document. The following documents are not accepted in lieu of the original trust agreement:*
    - *Certificate of Trusts*
    - *Memorandum of Trusts*
    - *Affidavit of Trusts*
- Add Beneficiary information

It will take 4-5 days to approve the Trust account. You will receive an email from Betterment when your trust account has been approved. After the trust is approved, transferring assets from your individual (taxable) accounts will require written confirmation from the client to complete the transfer of other account assets into your trust.

Have questions?

If you have any questions about your recommended allocation and the goals for you Trust assets, you can contact us directly at **920.785.6012** or email us at support@myroboadviser.com. For more information on Trusts and setting up a Trust account, visit the Trusts section on the Betterment website. Betterment for Advisors, also maintains a support line you can call for site navigation assistance at **800.400.1571**.

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Disclosures: Content contained herein is presented is for informational and educational purposes only and is not intended as an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies, nor shall it be construed to be the provision of individualized investment, tax or legal advice.

My Robo Adviser is a digital investment service advised by ETF Model Solutions, LLC. Investments recommended by My Robo Adviser™ involve risk and will fluctuate in value. Unless otherwise stated, investments are not insured or guaranteed. May lose money. My Robo Adviser™ utilizes the platform and technology services of Betterment LLC, an SEC Registered Investment Adviser. Betterment provides the wrap fee program that assists us in providing our services to you. Custody and trading services for the program are provided by Betterment Securities, an SEC registered broker-dealer and member FINRA/SIPC.

My Robo Adviser's services are specific to the investment goals that you identify. We do not provide comprehensive financial or tax planning. Our Advisory services rely upon an algorithm designed and maintained by Betterment to assist us in determining our portfolio recommendations. Unless you directly consult with My Robo Adviser™ Advisory personnel, the algorithm is the sole basis of the advice.

Clients and perspective clients should be aware that certain tools and content on the Betterment, LLC website, including projected returns, functionality, tax-coordinated portfolios and links to investment philosophy, research, educational materials and FAQs apply solely to Betterment's 2-dimensional portfolios and may not apply to MyRoboAdviser.com's 3-dimensional investment recommendations.

Existing My Robo Adviser™ clients are reminded to login and update personal information whenever their goals or personal financial circumstances change. Clients should also confirm that their current goal allocation is aligned with the recommended target allocation provided for each goal. Clients with questions regarding their account, personal financial circumstances, goals, or an investment allocation with respect to our service should contact us via email or telephone.

Prospective clients contemplating opening an account with My Robo Adviser™ are advised to read My Robo Adviser's Form ADV Brochure, Part 2A for important disclosures about our services, business practices, the costs and risks of investing, and other important considerations prior to opening their account. You can access the most recent version of our Form ADV via a link on our website.

ETF Model Solutions, LLC. is registered as an investment adviser with the SEC. Registration does not imply a certain level of skill or training. If you have any questions about our professional services, please call us at 920.785.6012 or email support@MyRoboAdviser.com