



## Make Your Investing Easier and More Accessible with an App

MyRoboAdviser™ has partnered with Betterment for Advisors as our technology platform and custodian to provide our services to our clients. This offers you access to a mobile app you can download to your smartphone. Since Robo Advisers are generally viewed as more technologically savvy, it comes as no surprise that the app is sleek and functions nicely. We recommend all MyRoboAdviser™ clients' download Betterment's app so that they can access their accounts from anywhere. To locate the app, search for "Betterment" on the app store (NOT MyRoboAdviser™) and then download the app to your device. Once the app is downloaded, simply login with your regular username and password. We recommend you turn on Multi-Factor Authentication (MFA).

The app does not provide everything that is provided on a desktop computer but it provides a significant portion of important information. Everything is "condensed" in the app compared to the regular login. You are able to make deposits & withdrawals as well as adjust your portfolio allocation from within the app. You can also add goals/accounts from the mobile app. When it comes to the retirement advice/plan, you are able to view your "retirement plan" in the app but not make changes to it. Thus, you will see your "projected spending" and "desired spending" amounts as well as your retirement age and whether you are on- or off-track for your plan. For non-retirement goals, you will be able to view & update your target amount and time horizon. The summary page of the app will show your net worth which includes all of your account balances plus all of your linked external accounts. You will also see your total dollar amount you have invested as well as the earnings and simple earnings percentage return.



Please reach out if you would like assistance downloading the app and setting it up or with navigation of the app once it has been downloaded.

### **Have Questions?**

If you have any questions about holdings in your account or one of our models, or perhaps have another question about our services, you can contact us directly at 920.785.6012 or email us at [support@myroboadviser.com](mailto:support@myroboadviser.com). Betterment maintains a support line you can also call for help with navigation, linking your accounts or other site functionality. You can call the Betterment for Advisors support line 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](mailto:support@MyRoboAdviser.com)*