Altruist

Feel good about your money.

We believe a great advisor can help you reach your financial goals quicker and with less stress.

So we built a technology platform to remove the friction from managing your money and made it easy for your financial advisor to do their best work.

Altruist

We’re changing the way advisors work.

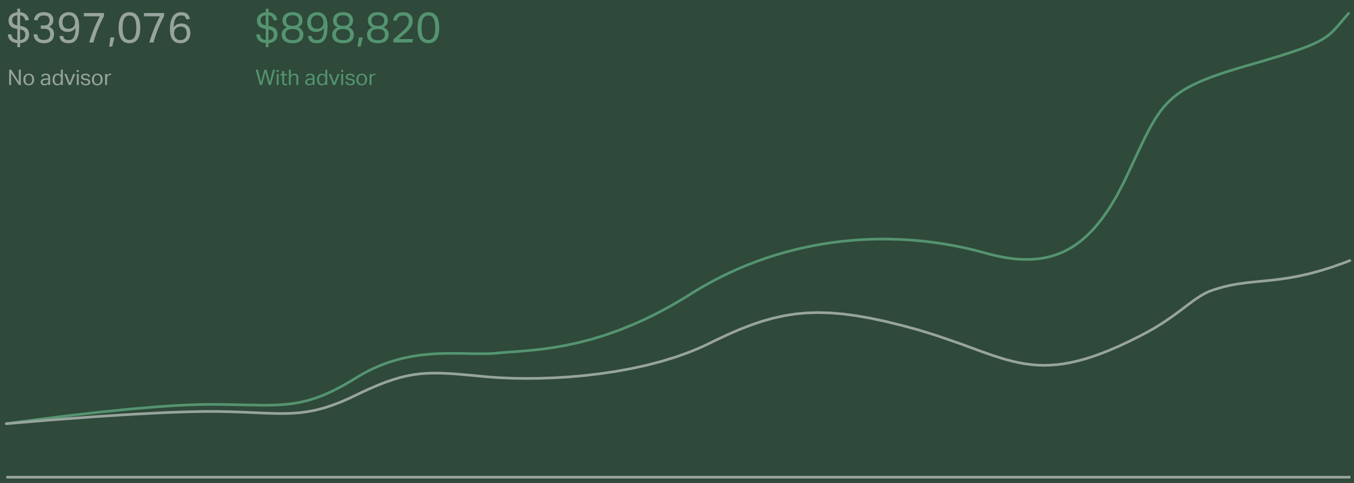
Before Altruist, being a financial advisor required a lot of complicated and expensive software. Now, all essential advisor tools are together on one easy-to-use platform — from opening accounts and managing investments to analyzing portfolios and providing efficient client service. Altruist is giving advisors more time to focus on better serving clients like you.

We designed Altruist to help financial advisors do their best work, and when they do, client returns can improve as much as 3% more each year.

What does 3% more look like over 30 years with $100k?

$397,076
No advisor

$898,820
With advisor



The chart assumes the hypothetical growth of $100,000 over 30 years with annualized returns of 5% and 8%. The returns and this chart are for illustrative purposes only and do not represent actual investment returns, trading activity, or performance. The increase of 3% may be achievable by investment advisors who implement best practices and strategies for serving their clients. Specifically: suitable asset allocation using broadly diversified funds / ETFs, cost-effective implementation (expense ratios), rebalancing, behavioral coaching, asset location (allocation of assets between taxable and tax-advantaged accounts), spending strategy (withdrawal order), total-returns versus income investing. A link to the white paper supporting this claim can be found below. Altruist Corp and its affiliates believe that our software and product offerings align with these best practices by either providing features that allow for them (i.e. offering commission-free, low-expense-ratio ETF trading, rebalancing, and tax advantaged accounts) and/or creating efficiencies for investment advisors through streamlined software so that they can spend more time on best practices such as the ones described by Vanguard, listed in the link below.

Source: Vanguard, Putting a value on your value, July 2022

Altruist makes it easy for your financial advisor to provide you with a great client experience.

Goodbye complicated paperwork. Altruist is entirely digital. This helps save you and your financial advisor time and money. And makes it a whole lot more fun to use.

Hello more efficient investing. With access to commission-free fractional shares, your advisor can invest your money in high-quality assets, no matter the size of your account.

Your finances at your fingertips. View real-time performance, portfolio characteristics, and important tax and account documents at a moment's notice.

With Altruist, it's easy to stay in-the-know about your portfolio and connect with your advisor using our app or web portal. You can also open and fund accounts online in minutes with no paper at all.

We want to make financial advice better, more affordable, and accessible to everyone.

That's why Altruist is only available to Registered Investment Advisors (RIAs). RIAs have a fiduciary responsibility to put your interests first. We think that's important, so we built tools that give RIAs like your advisor the ability to serve you better.

We believe you deserve to feel good about your money.

Your advisor chose Altruist because they think so too.

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Altruist is an SEC-registered broker-dealer and a member of both the Financial Industry Regulatory Authority (FINRA) and the Securities Investor Protection Corporation (SIPC). Your money is protected and Altruist is subject to strict oversight by multiple entities. Keep in mind, all investing involves risk and can result in a decline.

We keep your information safe with around the clock monitoring and AES 256 encryption. Altruist earned a SOC 2 Type 1 Report, which means an independent auditor has examined our systems for the security, processing integrity, availability, and continuity of your data.

Learn more about how we protect your assets and information at altruist.com/security.

SIPC

1 Member SIPC, which protects securities customers of its members up to $500,000 (including $250,000 for claims for cash). Explanatory brochures are available upon request or at www.sipc.com.

Altruist

The way money should feel.

Learn more at altruist.com or talk to your advisor about getting started.

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