



ATOM

Human Element + Automated Account Management

Put **ATOM** in charge of your portfolio and combine a personalized strategy developed by your advisor, with automation to efficiently open and manage your account.

Easily invest in a diversified, professionally managed portfolio, comprised of low-cost investments.

- + Open an account in minutes
- + Easily combine accounts
- + Get online access 24/7 from any device

Research says

The most important thing you can do to meet your long-term financial goals is to **start saving—the sooner the better!**

Get started

- 1** Answer a few questions to help determine your investor profile
- 2** Review your advisor's recommended portfolio
- 3** Complete online account opening and funding process



Aa

Asset Allocation

We will help employees get their investment mix in line with their long-term strategy.