

Our Client Experience

A PASSION TO EXCEED EXPECTATIONS

Our firm was founded on the belief that there should be a better solution for investors. A way to invest that is innovative, intelligent, and reflects our passion to help investors meet their goals.

CUSTOMIZED PORTFOLIO ADVISEMENT

At The ETF Store, you get a team of advisors that uses the power of ETFs to help you spend less and keep more of what is yours. From day one, we will tell you what you are paying for, what you are getting and where your money is. Plus, we will help you design the right ETF mix for your needs, which allows you to reduce your risk and still take advantage of new market opportunities around the world. It is a systematic method that reduces the stress of investing. It is a level of transparency and flexibility made possible with ETFs. Our goal is simply to minimize your investment costs and maximize your returns. We believe that by using ETFs, we can provide the best portfolio asset allocation in the most efficient manner.

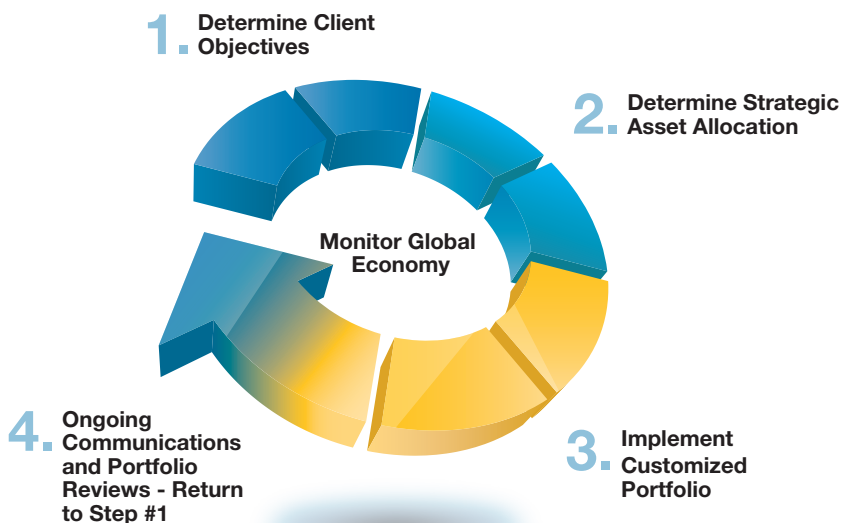
We've tailored our client service process to make your experience as easy as possible. Below is a step-by-step way to take advantage of ETFs:

1. Determine Client Objectives. We will sit down with you and assess your current financial situation, your risk tolerance, and your financial goals. We will also provide a free analysis of your existing portfolio. Based on our assessment of your situation, we will recommend an investment portfolio.

2. Determine Strategic Asset Allocation. Based on your specific risk tolerance and financial goals, we will tailor a portfolio and investment plan for your situation.

3. Implementation. We will help you establish an account with one of our independent custodians and implement your customized investment plan. You will have full access to your account online through the independent custodian and direct access to your advisor.

4. Ongoing Communications and Portfolio Reviews. You will receive monthly statements from the independent custodian in addition to comprehensive quarterly statements from The ETF Store. In addition, your advisor will review your portfolio quarterly, provide you with market updates, and be available to answer any questions you might have.



CONTACT US

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