

Our Client Experience

A PASSION TO EXCEED EXPECTATIONS

Our firm was founded on the belief that investors deserve more. That there should be a better solution. A way to invest that is innovative, intelligent, and reflects our passion to help investors meet their goals. Our desire is to always exceed your expectations.

CUSTOMIZED PORTFOLIO ADVISEMENT

At The ETF Store, we are dedicated to helping you spend less and keep more of what is yours. From day one, we will tell you what you are paying for and where your money is invested. Plus, we will help you design the right portfolio for your needs, which allows you to reduce risk and still take advantage of new opportunities around the world. It is a systematic method that reduces the stress of investing. We provide a level of transparency and flexibility made possible with ETFs. Our core philosophy 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:

1. Determine Client Objectives

Our advisors take great care to fully understand your unique situation and financial goals.

2. Determine Strategic Asset Allocation

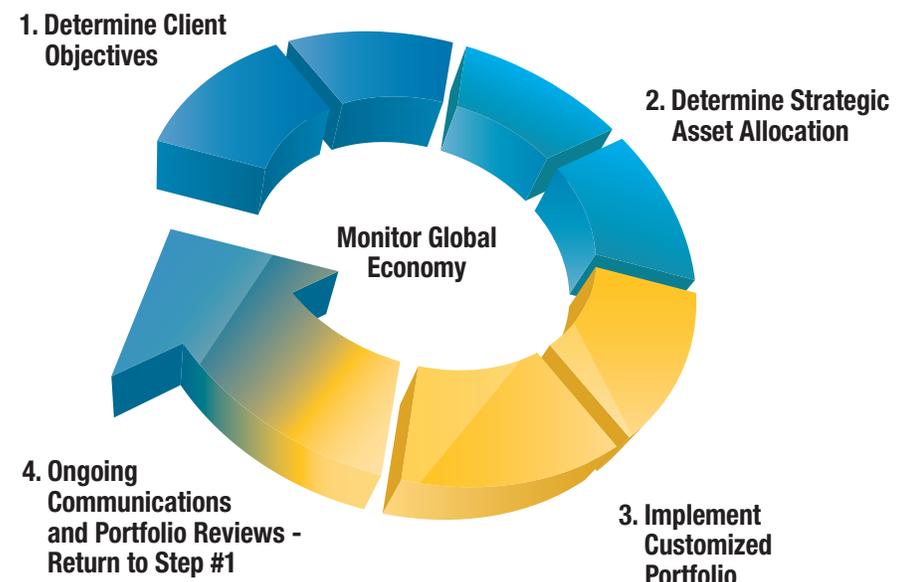
Based on your specific risk tolerance and financial goals, your advisor will tailor a portfolio and investment plan for your situation.

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 and direct access to your advisor.

4. Ongoing Communications and Portfolio Reviews

You will receive monthly statements from the independent custodian in addition to quarterly statements from us. We also provide ongoing market updates and your ETF Store advisor will conduct periodic reviews of your portfolio.



CONTACT US

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