

Investment Experience with Efficient, Low-Cost, Globally Diversified Portfolios

Allodium Portfolios leverages technology to maximize the value you receive—all with a personal touch that comes from an advisor who knows you and your family. Our time is spent on high impact service, not pushing paper. You pay for value, not administration.

Instant Access

Account access available anywhere using our website or mobile app

Smart Tax Strategies

Implement tax loss harvesting and asset allocation to help minimize taxes

Smart Re-Investment

Immediate investment of cash inflows, minimizes taxable transactions

Save Smarter

High yield cash account earning more than the national average; FDIC insured up to \$1 million

Automated Deposits

Schedule regular transfers from your checking account online

Charitable Giving

Donate securities directly to charity or cash from your IRA account (if over 70½)

Automated Rebalancing

Your asset allocation never drifts beyond target

Responsible Investing

Several portfolios available to align with your values

Create Goals

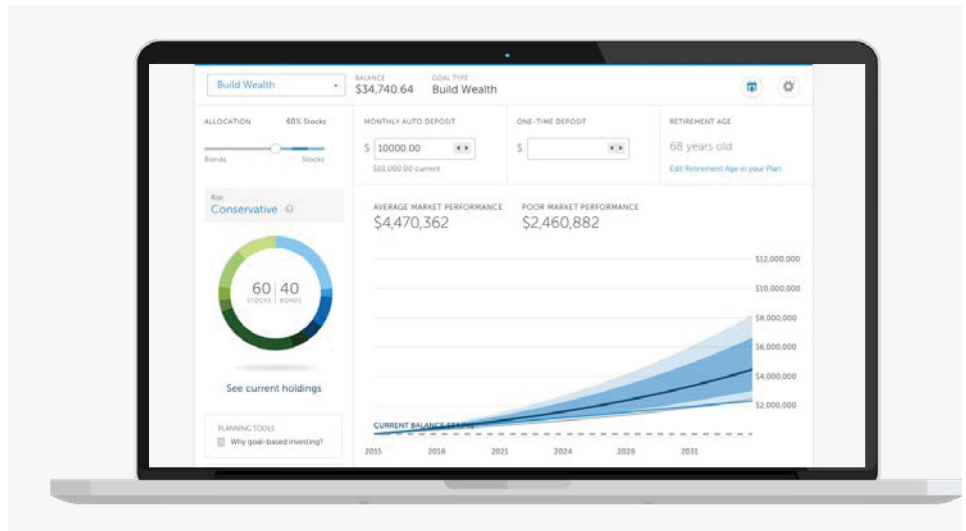
Set account goals to track progress.

The Efficiency of Technology PLUS the Intimacy of a Personal Advisor

Your portfolio consists of globally diversified ETFs from firms like Vanguard and Blackrock without the high fees (and typical underperformance) of most actively managed mutual funds.



Allodium Portfolios works with Betterment Institutional to develop a broadly-diversified investment portfolio for you using low-cost index funds to help you to move closer to your long term financial goals.



Get Started in 3 Easy Steps

https://www.betterment.com/allodium-investment-consultants/app/signup/?advisor_token=brnwCwZ5w64

1

Sign Up

In less than 30 minutes

2

Link

Your funding account

3

Create

A financial goal

Disclaimer

Allodium Investment Consultants, LLC ("Allodium") is an SEC registered investment adviser with its principal place of business in the state of Minnesota. This publication is limited to the dissemination of general information pertaining to its investment advisory/management services and is not intended to provide investment, tax, legal or other advice.

While taken from sources deemed to be accurate, the information contained herein is subject to change, and Allodium makes no representations about its accuracy, completeness or appropriateness for any given situation and disclaims any liability arising from use of or reliance on this information.

Client satisfaction results and recognition by publications should not be construed as a guarantee of certain results when Allodium is engaged for investment advisory services, nor should it be construed as a current or past endorsement for Allodium by any of its clients.

For additional information about Allodium, including fees and services, please request our disclosure statement as set forth on Form ADV using the contact information herein. Please read the disclosure statement carefully before you invest.

Betterment Institutional disclaims any and all responsibility for the content in this presentation. The content of this presentation was not prepared or reviewed by Betterment Institutional.