

2. Giving Investments Purpose

Investment strategy should be driven by a specific and numerically measurable end goal. Age-based portfolios and target date funds set a timeline on your investments, but are they aligned with the priorities of your investment accounts?

Our personalized online financial planning process is designed to meet your specific needs through direct collaboration with your advisor. This simple 5-Step approach will finally give you an investment strategy that has clear cut accountability.

Find Out How

3. OpenSource Investing™

No single investment institution has the answer to all of your financial planning problems. This is why Cornerstone utilizes and open architecture investment platform to find specific opportunities that are right for you. OpenSource Investing™ gives your advisor the ability to evaluate hundreds of investment companies across multiple industries and design a plan that is truly customized to your financial objectives.

Get Stared

