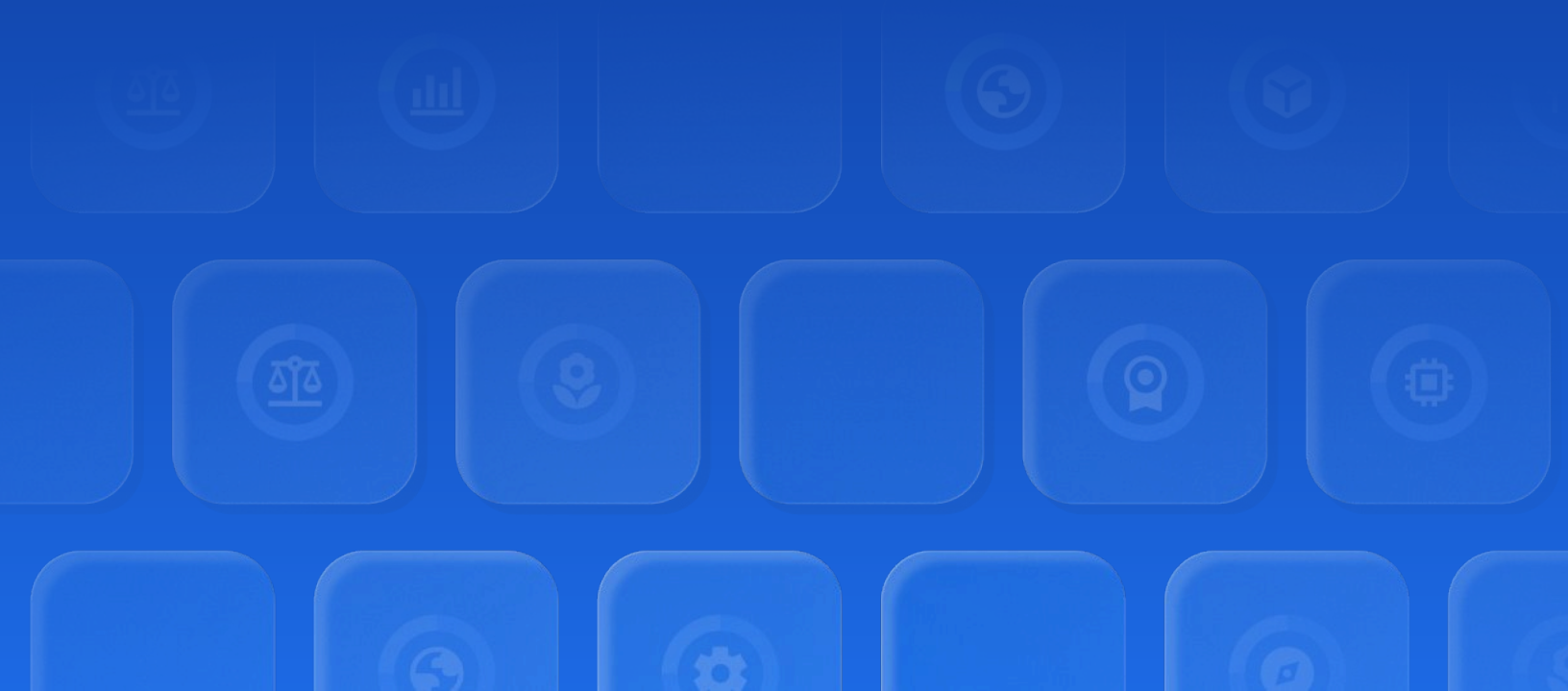


A model marketplace for how you work

Streamline and scale your practice with portfolios from Betterment and leading asset managers. Utilize our portfolio management tools and tax-saving technology so you can manage more clients with less effort.

Available models as of February 2026.



Manager	Model Series	Expense Ratio
AllianceBernstein	Dynamic Multi-Asset Income	0.19-0.22%
Alpha Architect	Global Beta + Factor	0.16-0.31%
Betterment	Broad Impact	0.13-0.17%
	Climate Impact	0.13-0.19%
	Core	0.03-0.13%
	Crypto ETF	0.12%
	Innovative Technology	0.10-0.13%
	Social Impact	0.15-0.19%
	Target Income built with BlackRock	0.20%
	U.S. Only	0.02-0.13%
	Value Tilt	0.03-0.13%
Cambria	Trinity Portfolios	0.58-0.89%
Dimensional	Core Plus Wealth Models	0.15-0.23%
Goldman Sachs Asset Management	Dynamic Active/Passive	0.19-0.22%
	Smart Beta	0.12-0.15%
	Tax-Smart Bonds	0.14-0.15%
J.P. Morgan	Strategic ETF Models	0.22-0.23%
State Street Investment Management	Active Asset Allocation	0.22-0.29%
	Enhanced Strategic Asset Allocation	0.15-0.27%
	Quarterly Asset Allocation	0.16-0.31%
Vanguard	Strategic ETF Model Series	0.04%
	Dynamic Series	0.04%
	Fixed Income – Capital Preservation	0.07%
	Fixed Income – Income Focused	0.21%
	Fixed Income – Risk Diversification	0.06%
WisdomTree	Siegel-WisdomTree Model Portfolios	0.20-0.24%

As of 3/3/26, expense ratios are net figures provided by fund managers. Risk-level ratios are calculated as the weighted average of the underlying funds' net expense ratios. Subject to change.

Spend less time building and maintaining portfolios and more time deepening client relationships and growing your business.

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