rebalance

Money is complicated.
We *simplify it.*

rebalance

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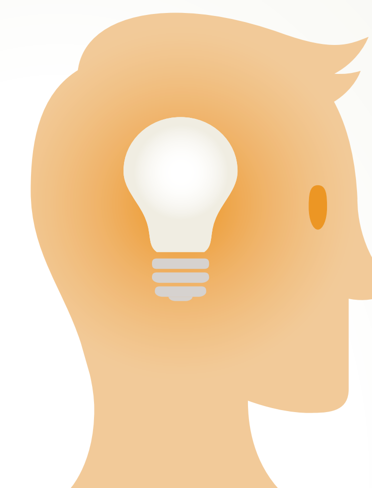
we’re here to help you live well and retire with more.

Low Fees

Expert Investing, Planning, & Advice



The Industry’s Brightest Minds

World Class Service

Low Fees, High Returns

Rebalance manages your investments with some of the lowest fees in the industry. In fact, we can save you on average over 50% in annual fees according to a recent *Wall Street Journal* survey.

Rebalance360

With world-class investing, financial planning, and decision-making advice, Rebalance360 combines three powerful services into one transformative approach to your financial life.

Our Investment Committee

Rebalance puts some of the brightest minds in the investment industry to work for you. Our world-renowned Investment Committee curates every Rebalance portfolio we offer.

Great Advisors, Good People

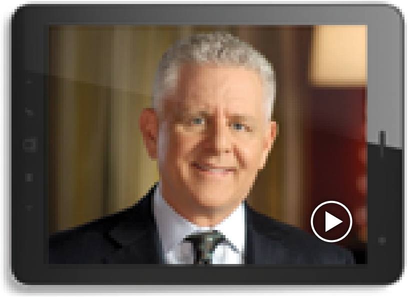
Our client relationships are very much like our investments: stable, dependable, valuable, and long-term. That’s because you’ll have the same advisor as long as you are a member of the Rebalance family.

Two partners, one mission.

At Harvard, Mitch Tuchman and Scott Puritz were united by an idea that there had to be a better way to help everyday Americans live well and retire with more. That idea became their lifelong mission. That idea became Rebalance.

Watch Scott's video

www.rebalance360.com/expert-advice/meet-scott-puritz ▸



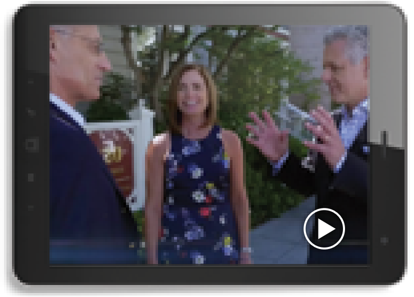
Watch Mitch's video

https://www.rebalance360.com/expert-advice/meet-mitch-tuchman ▸

Setting the pace of an industry.

Winner! Rebalance named industry pacesetter by Charles Schwab

Every year, Charles Schwab recognizes investment firms that have "moved the needle" and made an impact in the investment industry. This year, out of over 1,000 firms, they recognized our team — awarding Rebalance with their prestigious Pacesetter award for visionary leadership, operational excellence, and innovative use of technology.



Watch the video:

https://www.rebalance360.com/schwabpacesetter2018award ▸

Welcome to the family.

At Rebalance, our client relationships are very much like our investments: stable, dependable, valuable, and long-term. That's why you'll have the same advisor as long as you are a member of the Rebalance family.

The Power Of Two Dedicated To You

Rebalance pairs each and every one of our clients with a seasoned investment advisor and a highly qualified service professional. They're your own personal finance team, monitoring your money and your situation, ensuring that you are always on track to achieve your financial goals. It's a five-star approach used by elite wealth management firms, providing highly personalized advice and service that ensures your money is managed safely, effectively, and most of all personally.

Watch Sally's video

https://www.rebalance360.com/expert-advice/client-support-dedicated-two-person-team

No backstage pass necessary.

At Rebalance, the people you see on our website, or on CNN, or the *New York Times*, or perhaps presenting expert testimony to the U.S. Senate are the same people who pick up the phone when you call. And we're the same people who help guide you through all of life's important decisions. So while you may see us on TV, you won't need one to bring us into your living room.

U.S. Senators Applaud Rebalance

Managing Director Scott Puritz recently testified before the U.S. Senate on rules designed to make retirement investing safer.

Watch the video:

https://www.rebalance360.com/cri/u-s-senate-scott-puritz-expert-testimony ▸

Rebalance on PBS Wealthtrack

Wealthtrack host Consuelo Mack sits down with Mitch Tuchman and Professor Burton Malkiel, to discuss Rebalance's prudent approach to investing.

Watch the video:

https://www.rebalance360.com/news/malkiel-tuchman-retirement-autopilot ▸

Perez Showcases Rebalance

U.S. Secretary of Labor Thomas Perez showcases Rebalance's adherence to the fiduciary standard, and our Firm's experience with "brokerage refugees."

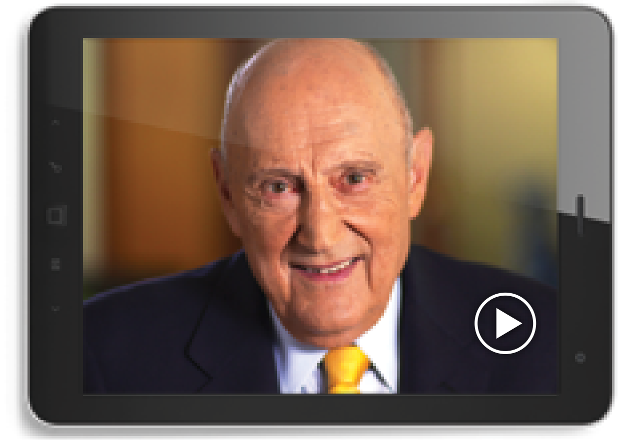
Watch the video:

https://www.rebalance360.com/u-s-secretary-of-labor-thomas-perez-showcases-rebalance-ira/ ▸

Learn more at www.rebalance360.com/what-we-offer ▸

The industry's brightest minds.

Rebalance puts some of the brightest minds in the investment industry to work for you. Burt Malkiel, Charley Ellis, and Jay Vivian make up our Investment Committee and their world-renowned financial expertise informs every Rebalance portfolio we offer.

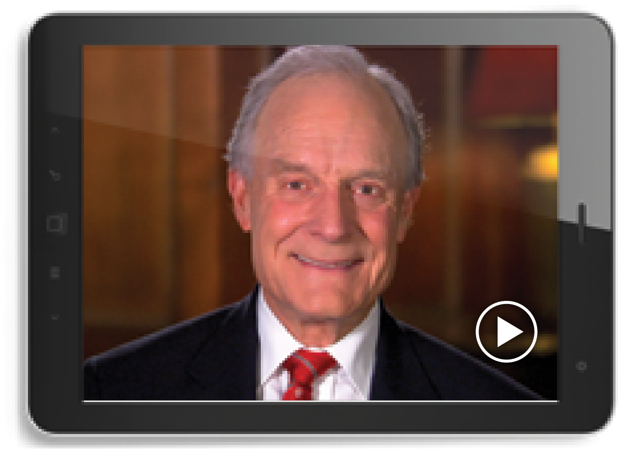


Burt Malkiel

A prolific author and highly respected voice in the investment industry, Dr. Burton G. Malkiel has written hundreds of scholarly articles and opinions, including the investment classic, *A Random Walk Down Wall Street.* Throughout Burt's career, there has been one unwavering constant: his passionate belief that the power of low-cost, diversified, and well-balanced index-based investing should be available to all American families. It is this passion that makes him a part of our team today.

Watch Burt's video:

https://www.rebalance360.com/news/burt-malkiel-on-rebalance-ira ▸

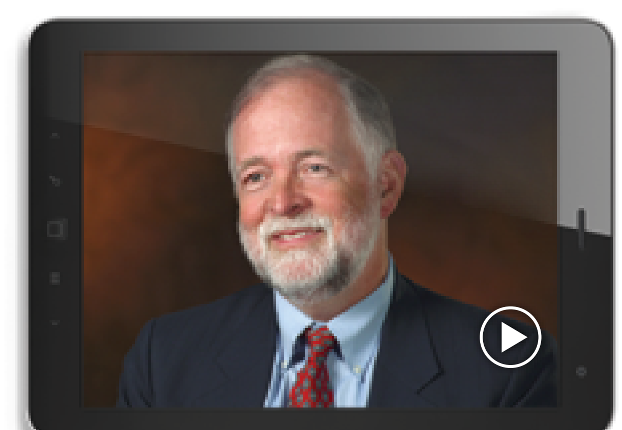


Charley Ellis

Dr. Charles D. Ellis has served on the governing boards of both Harvard and Yale business schools as well as the Board of Directors of America's largest fund company, The Vanguard Group. In his best-selling books *Winning the Loser's Game,* and *The Elements of Investing,* Ellis helps guide individuals and families toward financial security through the use of low-cost, highly diversified passive investing—all core elements of the Rebalance investment philosophy.

Watch Charlie's video:

https://www.rebalance360.com/news/charles-ellis-why-i-joined-rebalance-ira ▸



Jay Vivian

As the former Managing Director of IBM's Retirement Funds, Jay Vivian knows how to help people retire with more. *Treasury & Risk* magazine showcased Mr. Vivian among the "100 Most Influential People in Finance," and in 2010, *Plan Sponsor* gave him its Lifetime Achievement Award. Given his wealth of knowledge and experience managing retirement assets, it comes as no surprise that Jay is a member of our Investment Committee at Rebalance.

Watch Jay's video:

https://www.rebalance360.com/news/jay-vivian-rebalance-frequency ▸

Learn more at www.rebalance360.com/team ▸

rebalance360

Three powerful services.
One transformative approach.

What do you get when you
combine world-class investing...

...financial planning,
and decision-making...

...together with low fees and
best-in-class advisors?

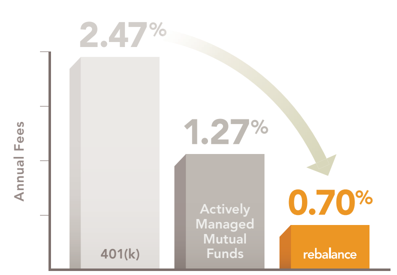
You get Rebalance360 —
the high-value, low-cost solution
to your complete financial life.

invest 360

World class investing for everyday life.

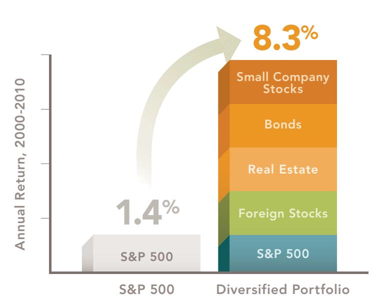
Our Invest360 investment platform offers the same low-fee, tax-efficient, globally diversified portfolios used for our world-class retirement investing but applied to taxable as well as non-taxable assets, so we can help you save money for the long-term, short-term, and everything in between.

Lower fees, higher returns.



Rebalance manages your investments with some of the lowest fees in the industry. In fact, we can save you on average over 50% in annual fees according to a recent *Wall Street Journal* survey. Because of the miracle of compounding even small reductions in fees can make a big difference in the size of your nest egg.

Balanced, global diversification.

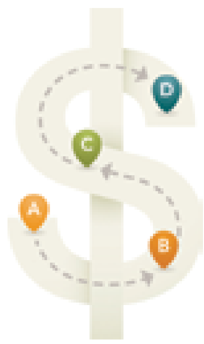


Every Rebalance client account is a collection of globally diversified ETF funds selected to work together as a balanced whole and provide higher, more stable returns over time. Forty years of research has shown that this type of balanced, diversified investing helps reduce risk and improve returns.

plan360

Your roadmap for the journey of life.

When you know where you want to go in life, but you're not quite sure the best way to get there, Plan360 provides a simple financial roadmap, tailored to your specific goals, showing how much money you can spend on your journey and what you'll have left when you arrive.



Planning for what you need today.

Plan360 is more than just a retirement plan, it's a comprehensive yet easy-to-follow cash flow analysis that serves as your financial North Star, helping you navigate the financial needs of today.

And what your goals are tomorrow.

Our state-of-the-art planning platform ensures that your big picture goals are always informing your roadmap. So you can be secure in the knowledge that while you're living well today, you'll have enough to realize your big dreams of tomorrow.

If life is a journey, this is your map.

Learn more at www.rebalance360.com/about360 ▸

advise360

Money is complicated. We simplify it.

Advise360 draws from our deep bench of financial experts to make sense of even the most complex of financial decisions – guiding you with real-world advice, helping you avoid big mistakes, and empowering you to navigate your financial life with confidence. So you enjoy more, and worry less.

Advice for life.

Advise360 is a service that helps guide you through the financial ins and outs of everyday life, not just saving and investing. From refinancing your home, to finding the right insurance policy, to saving strategies for your kids' college, Advise360 is more than investment advice, it's advice for life.

A library of advice.

In addition to our incredible team of advisors, Advise360 also provides access to our comprehensive library of white papers, articles, and videos. All created by our team and organized by topics. So it's easy to find what's relevant to you.

Money is complicated.
We simplify it.

Learn more at www.rebalance360.com/about360 ▸

so how do we do it?

Advise

We review your current assets and allocations, your hopes and dreams... and then recommend a long-term plan.

Transform

We harmonize all of your existing investments into an optimized plan best suited for you and your goals.

Grow

We monitor your investments every step of the way — making sure your money is growing and you're still on track.

Relax

Now sit back, relax, and watch your money grow.

Learn more at www.rebalance360.com/how-it-works ▸

we wrote the book on retiring with more...

Learn more at www.rebalance360.com/press-room ▸

safe & secure

Investing is challenging. The stakes are high and the repercussions of an investing misstep may not be evident for years to come. Our Strategic Partners are some of the most trusted names in the financial industry, ensuring your money is safe, secure, and accessible when you need it to sustain you and your family through retirement.

You Come First

Rebalance has been, and always will be, independent. We are unencumbered by corporate ownership and serve only one customer — you. Being a Registered Investment Advisor (RIA) means that we are legally compelled to put your interests ahead of our own. (We, of course, would do so anyway, but it's important to know nonetheless.) Brokers do not operate under this standard. They get paid commissions to sell you products and increase their corporation's profits. Can you say, "conflict of interest"?

Fidelity INVESTMENTS charles SCHWAB

Custodians

Rebalance clients maintain control of their own investment accounts at Schwab or Fidelity. These special institutional relationships allow Rebalance to manage our client portfolios on highly secure brokerage platforms, offer low-cost trading commissions, and bring tight controls and independent oversight to client securities and cash.

LLOYD'S SIPC

Insurance

All Schwab and Fidelity accounts are protected by the Securities Investor Protection Corporation (SIPC) for up to $500,000 in securities and $100,000 in cash. Both firms provide an extra level of coverage from Lloyd's of London for nearly unlimited amounts of securities and up to $1.9 million in cash.

waller

Legal/Regulatory

Rebalance is regulated by the U.S. Securities and Exchange Commission (SEC) as a registered investment advisory firm. We have partnered with Waller LLP, a successful, multi-dimensional firm with a long history. Established in 1905, Waller is recognized for their steadfast dedication to complex compliance issues and financial industry best practices. As SEC regulations continue to evolve, Waller stays in step with the changes and ensures that Rebalance continues to maintain strict compliance guidelines.

Learn more at www.rebalance360.com/team ▸

let us help you live well, and retire with more

Let's have a conversation.

Interested in learning more? Scheduling a conversation with a Rebalance investment advisor is your chance to have a seasoned professional evaluate your investments, analyze how much you are paying in fees, and make recommendations for earning more money with less risk.

www.rebalance360.com/advisorcall ▸

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www.rebalance360.com