



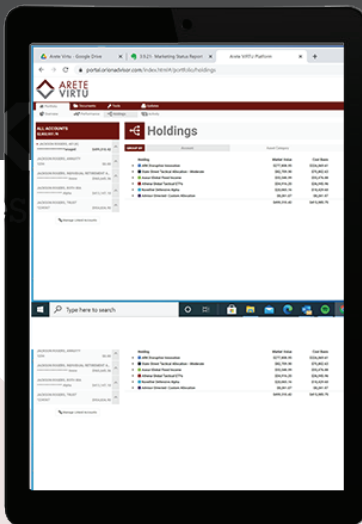
# Guided Portfolio Solutions

THE RIGHT WAY TO MANAGE INVESTMENTS.

**ARETE VIRTU** offers comprehensive billing, aggregated reporting, and financial planning for advisors looking to scale their advisory practice. Virtu provides a mobile app as well as an on-demand portal for clients to directly link their outside accounts, providing advisors a complete picture of their clients' total wealth. With complete oversight, Virtu allows advisors to provide a number of customized strategies and services based on their investment goals.

## VIRTU GUIDED PORTFOLIO

is a stand-alone solution executed in each clients' existing fee-based brokerage account. This single manager solution offers broad diversification and dynamic management in a single portfolio. Managers include Anchor Capital, Goldman Sachs Asset Management, Putnam Investments, State Street Global Advisors, and Zacks Investment Management.



### RISK PROFILE

Complete a client risk profile on [virtu.aretewealth.com](http://virtu.aretewealth.com) and validate your client objectives.



### MANAGER CHOICE

Choose your preferred manager from the Guided Portfolio Solutions manager list, which also generates client-facing materials.



### EXECUTION

Allocations are digitally signed. Manager and Program ADVs are automatically sent to clients.

## MORE POWERFUL WITH OUR PARTNERS.

Arete Virtu is built on Orion Advisor Tech and administered by the Axxcess Platform from Axxcess Wealth Management.



ARETE  
WEALTH