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ACCESS SOFTEK, INC

EasyVest™

Seamlessly Integrated Investing

EasyVest is the first robo-advisor designed to seamlessly integrate with any bank and credit union online and mobile banking platform. It provides the services of a personal banker via automation and algorithm-based financial planning services. This automation provides community institutions a tool to tap into the \$73 trillion investment market and provide wealth-building services traditionally dominated by investment firms, fintechs and large national banks.

EasyVest assesses a user's timeframe, risk appetite, income and investment goals in order to suggest the right portfolio for them. Users can invest in individual or retirement accounts, purchase fractional shares and automatically rebalance their portfolio. EasyVest features an array of low-cost, broad index ETF portfolios. With its intuitive dashboard, it is easy for end users to set up investments and recurring transfers and let the technology do the work for them.

Lower Investment Barriers

With EasyVest, individuals can start with as little as \$200 and can easily establish recurring transfers from their checking or savings account directly into their investment account. Plus, through personalized allocation of their investment dollars, users can support socially responsible causes that matter to them, their families, and their communities.

Features

- Seamlessly integrated within online and mobile banking apps
- Offers a set of APIs that work with any online or mobile platform
- Customizable features and rules
- Individually customized portfolios range from conservative to aggressive
- Ability for users to easily move funds from another financial institution
- Investors can choose green and socially conscious investment options
- Users can invest small amounts and own fractional shares for a nominal fee



For more information about how your credit union can engage members and non-members with this valuable resource, email consult@myleverage.com.

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