

How Betterment can support you



Practice management consulting

Work 1:1 with a business consultant who can help you create and implement a firm strategy—building a value prop, defining service models, and segmenting for efficiency—tailored to your needs.



Seamless transition process

Thinking of going digital? We simplify the paperless experience, from onboarding to funding. Our transition team can help you manage the process from start to finish.



In-depth team training

Get customized training for your whole team on how to use Betterment for Advisors. Master our workflows and best practices so you feel confident rolling the platform out to clients.



Templates and resources for your clients

Skip the busywork. We'll share our library of content with your team to use with clients during onboarding and throughout the year.



401(k) plan solutions

Get access to a retirement specialist who can help streamline and scale your 401(k) business.



Ongoing support and partnership

A dedicated back office support team for all the day-to-day questions and regular check-ins with a relationship manager committed to helping you grow.