Innovation in FinTech

Marstone

The new era of digital wealth is here.

Margaret J. Hartigan
CEO and Co-Founder

About us

Marstone is a comprehensive online investment and financial planning platform that provides an innovative and intuitive experience for institutions and individual consumers. The media and the financial industry have given the term “robo advisor” to platforms such as ours, since the entire investing experience can be done digitally, without human assistance.

FOR FINANCE PROFESSIONALS :

Powered by Marstone

Our entry into the marketplace is with our institutional investment solution, called Powered by Marstone.

This white-label solution allows banks, brokerages, and other financial institutions to quickly and cost-effectively launch and brand their own consumer-facing digital wealth service.

Currently live and on-boarding institutional clients

FOR CONSUMERS AND INVESTORS:

www.marstone.com

Marstone’s own branded RIA offering includes direct-to-consumer robo-advice along with a variety of other financial tools. We combine gamification and hyper-personalization with each user’s own goals and aspirations, allowing investors to make decisions with greater knowledge and confidence.

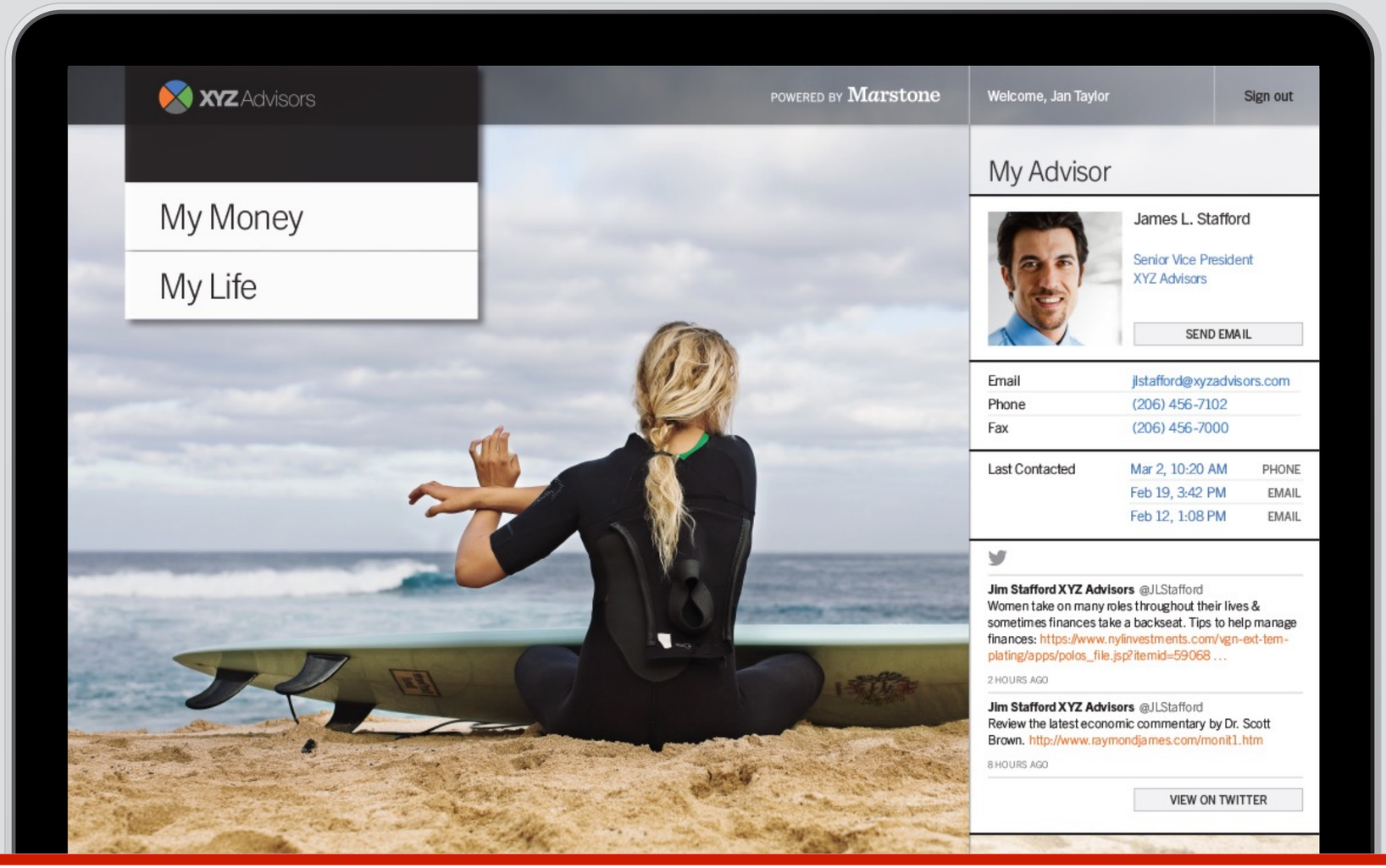
FOR FINANCIAL PLANNING:

Financial Planning tool

Our goal-based financial planning tool is an advanced, interactive solution that lets users plan for their futures in the unconventional ways everyone’s lives unfold.

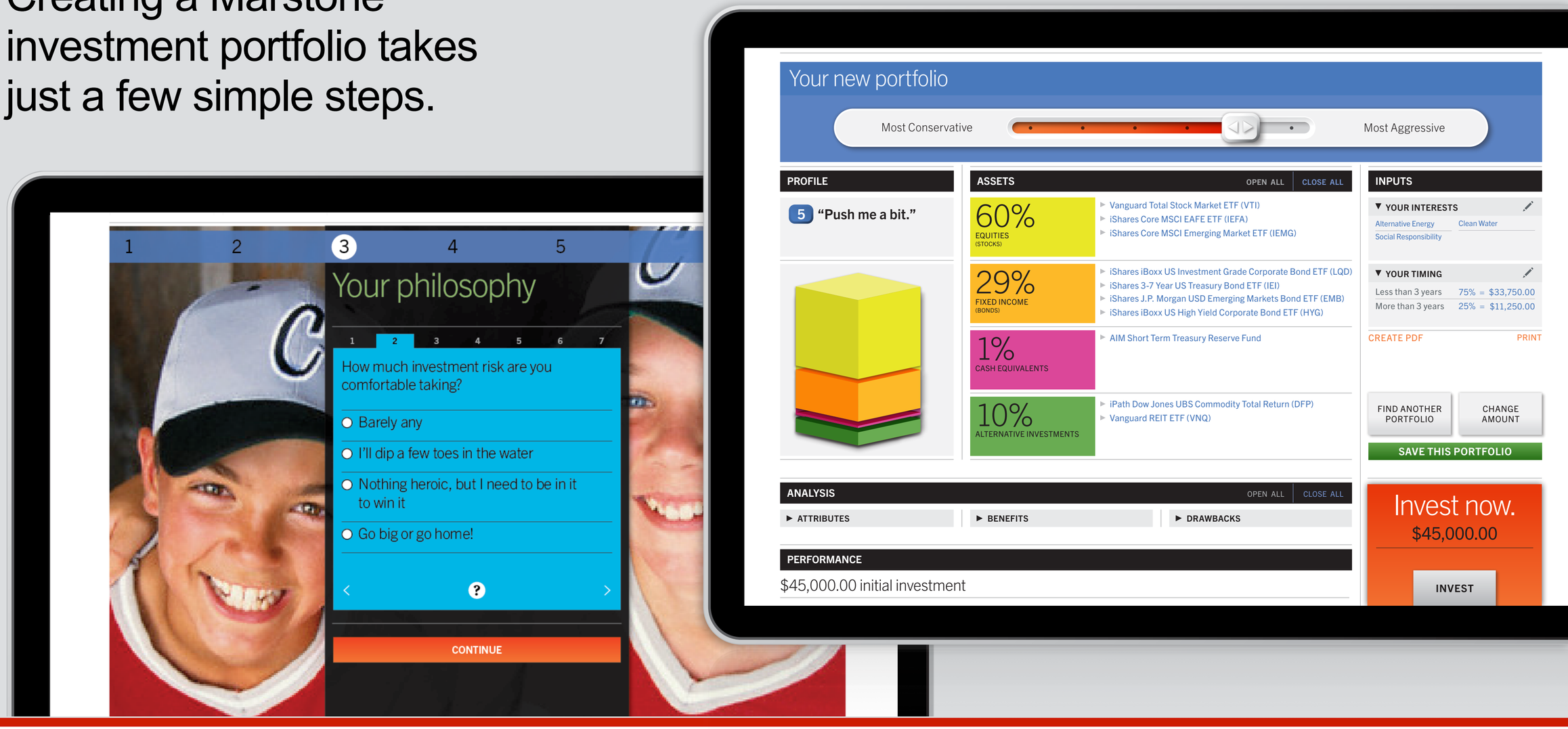
Launching 2017

The Marstone digital wealth solution



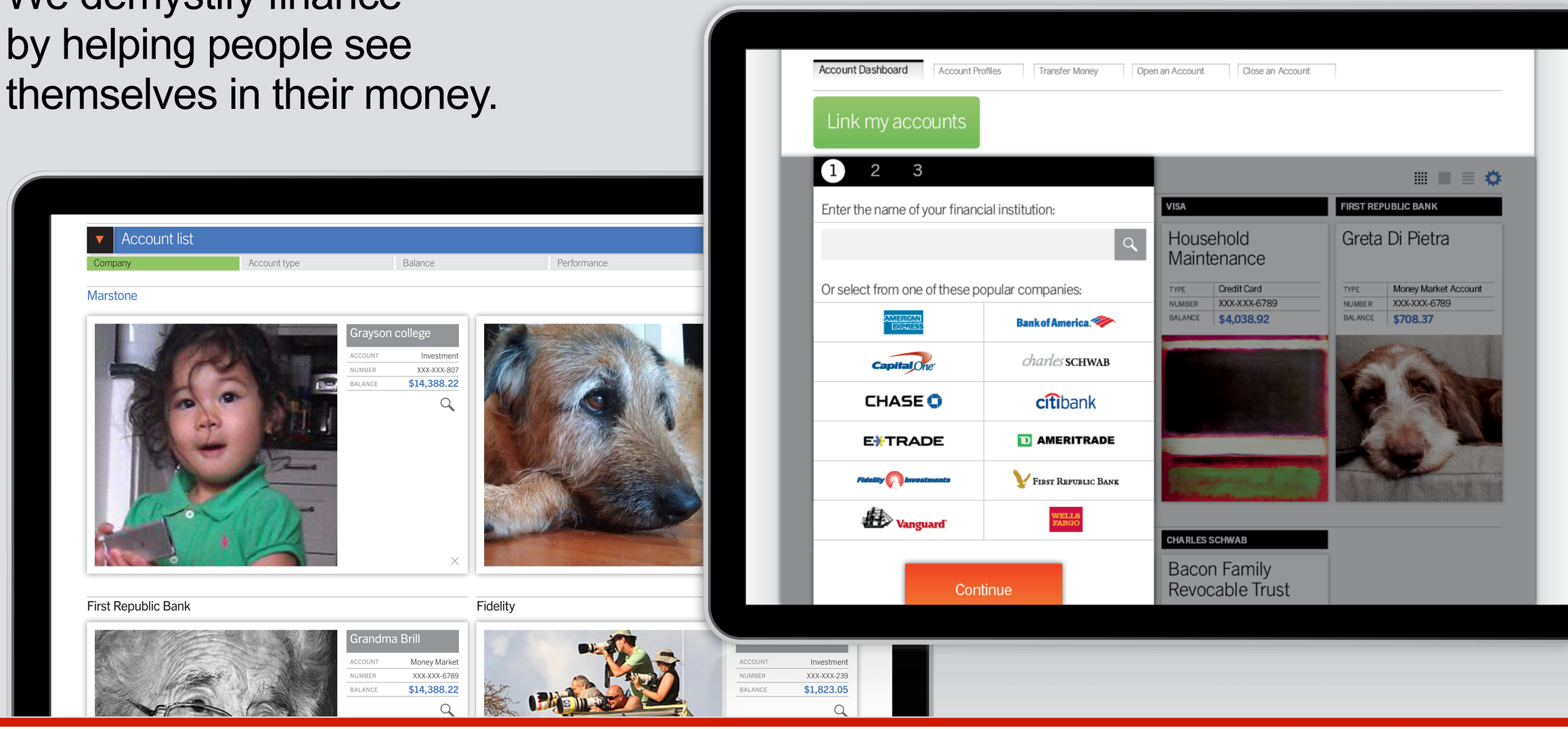
Marstone

Creating a Marstone investment portfolio takes just a few simple steps.



Marstone

We demystify finance by helping people see themselves in their money.



Strategic partners are key.

Marstone + Pershing

In June 2015, Pershing, a BNY Mellon Company, announced its strategic partnership with Marstone through the launch of our Powered by Marstone digital wealth solution.

Pershing

Marstone + IBM

We partnered with IBM because we realize that safety and scalability are of the utmost importance for any financial firm. This expertise is crucial for the international banks and brokerage firms who already use and trust IBM's products and services.

IBM

Marstone is a contemporary, user-driven, digital investment advisory that enables everyone to take control of their finances with easy-to-use, feature-rich tools.

We offer do-it-yourself portfolio building, outside account aggregation and analysis, interactive financial mapping, and many other useful and innovative features. The Marstone platform is available directly to consumers and individual investors, and can also be licensed for institutional use.

www.marstone.com

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