

Vanguard: Largest Hybrid Robo-Advisor

Digital Advisor

Min: \$3,000

Fee: 0.20%

- * All-digital
- * Automated investing
- * Goal tracking

Personal Advisor

Min: \$50,000

Fee: 0.30%

- * CFP access
- * Video meetings
- * Full planning

Wealth Management

Min: \$5M+

Fee: 0.30%

- * Dedicated team
- * Tax/estate planning
- * Alternative investments

Vanguard Advisory (2024):
- \$350B+ AUM (largest robo-hybrid)
- 2M+ clients
- 89% revenue from advisory fees
- Market leader in low-cost advisory