

	GEOMETRIC WEALTH ADVISORS	DO-IT-YOURSELF Vanguard, Fidelity, etc.	ONLINE INVESTMENT ALGORITHM WealthFront, Betterment, etc.	TRADITIONAL INDEPENDENT WEALTH MANAGEMENT FIRM	BIG BANK / BROKERAGE FIRM
INVESTMENT MANAGEMENT					
Low-cost investing	✓	✓	✓		
Fully diversified portfolio	✓	✓	✓	✓	
Tax-efficient placement of investments	✓		✓		
Strategic tax loss harvesting	✓		✓	✓	
Proper rebalancing techniques	✓		✓	✓	
Access to funds from Dimensional Fund Advisors	✓				
Integration of 401(k) accounts into investment strategy	✓			✓	
Behavioral "coach" to prevent emotional decisions/mistakes	✓			✓	
Outsource of time required to manage portfolio	✓		✓	✓	✓
Outsource of stress required to manage portfolio	✓			✓	✓
FINANCIAL PLANNING					
Pro-active guidance on all financial matters	✓			✓	
Advisors who understand your career and financial trajectory	✓				
Plans that consider assets not directly managed by advisor	✓			✓	
Deep integration between tax planning and investments	✓ *			✓	
Tax preparation/filing included in fee	✓ **				
Estate planning legal services included in fee	✓				
Outsource of time required to make financial planning decisions	✓				
Outsource of stress required to make financial planning decisions	✓				

\*For clients with more than \$1 million under Geometric's management

\*\*For clients with more than \$2 million under Geometric's management