EFFICIENT ADVISORS℠

SMART INVESTING SIMPLIFIED℠

Welcome to Efficient Advisors

We are aligned with like-minded financial advisors, working together to help investors invest smartly and simply.

Efficient Advisors was founded in 2009 to support advisors seeking to offer their clients the prudence of passive, structured investing based on academic discipline. Rather than claiming to possess market-beating expertise, we focus on deploying cost-efficient, globally-diversified asset allocation which we believe forms the basis for long-term investment success. We aim to offer advisors a collaborative culture based on a core philosophy of integrity, honesty and open communication.

We now deliver our prudent investment solutions by partnering with over 100 financial advisors nationwide. Our advisors share our investment philosophy and commitment to high-touch client service allowing us to support investors across the country and to manage over $1 billion in assets.

We founded our firm to support advisors seeking to offer their clients the prudence of passive, structured investing based on academic discipline.

At its core, our mission is to allow advisors to do what they do best — focus on their clients — while we provide a rigorous investment approach with superior back office services and educational training.

When you partner with Efficient Advisors, we help you become more efficient, more productive and more successful.

Rigorous Investment Approach

Our rigorous investment approach is guided by leading academic research, designed to give investors an under-standable, prudent and cost-efficient investment experience.

Ongoing Education

We support our advisors with ongoing webinars, monthly Advisor Insights and weekly Investor Minutes designed to keep our advisors and their clients informed.

Complete Back Office Services

When you partner with us, we help you become more efficient, more productive and more successful by delivering comprehensive back office services to our advisors.

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Why Work With Us

Transparency

When it comes to investing, costs matter. Most investors focus only on explicitly stated costs. However, the implicit costs associated with investing can diminish portfolio returns as well. Our goal is to provide fully transparent portfolios to give investors clarity about exactly what they are paying. We maintain a keen focus on investment expenses and most frequently implement our investment strategies using low-cost index and index-like investment options.

Objectivity

As investment stewards and advisors dedicated to responsible investing, we strive to ensure that our strategies and investment choices help meet your client's objectives and risk tolerance. We are not affiliated with any fund company. This allows us the ability to offer objective advice and the freedom to select from the universe of available investment options. Efficient offers no proprietary funds.

Global Diversification

Efficient offers a variety of ETF portfolios that are focused on capturing US and global market returns. Efficient structures asset allocation models designed to target specific risk and return premiums.

Fiduciary Management

Through our ERISA 3(38) Investment Fiduciary services we accept fiduciary responsibility (in writing) for our portfolios.

Practical Resources

We work closely with our advisors to support the needs of their businesses. Our ongoing webinars, monthly Advisor Insights and weekly Investor Minutes are designed to keep our advisors and their clients informed. Our team welcomes the opportunity to offer specific training and support that can be implemented today in every area of their practice.

Smart 401k Investing Program

We help 401k participants and plan sponsors avoid the common temptation to pick “winning” stocks or rely or a fund manager’s past performance to provide future returns. Our low, cost passively indexed portfolio offering coupled with ongoing participant education helps employees navigate crucial investment decisions. Advisors utilizing our tools can search for a plan, run a diagnostic, create an efficiency analysis and build a proposal to win the plan. Additionally, we offer retirement plan benchmarking that provides meaningful metrics regarding plan costs, participation, utilization and investment diversification.

State-of-the-Art Technology

Our reporting and administration system, coupled with our leading edge client relationship management software, provides an ideal platform for reliable and effective client service. Clients and advisors can review their account information and a multitude of reports online at www.EfficientAdvisors.com with the click of a button.

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