



Guided Wealth Portfolios

A Client Overview of InVestra's Digital Investment Service

What Is Guided Wealth Portfolios?

[Guided Wealth Portfolios](#) (GWP) is a modern investment solution provided by InVestra via: www.GuidedWealth.com that combines automated investing technology, personalized financial planning, and access to a dedicated financial advisor.

How the Service Works

Clients complete a short questionnaire, receive a personalized portfolio, fund their account, and benefit from continuous monitoring and automatic adjustments.

Key Features & Benefits

- Personalized investment strategy
- Professional management and rebalancing
- Access to a human advisor
- 24/7 digital account access

Investment Approach

Diversified ETF portfolios, goal-based investing, tax-aware strategies, and a long-term investment focus.

Cost Structure

Generally lower than traditional advisors and higher than robo-advisors. Transparent fee structure provided.

Minimum Investment

Approximately \$5,000.

Who This Service Is Best For

Ideal for investors seeking guidance, simplicity, and long-term growth.



Comparisons

Balances advantages of both traditional advisors and robo-advisors.

Risks

All investments carry market risk and no guarantees.

Why Clients Choose GWP

Combines technology, professional advice, and accessibility.

Final Thoughts

A smart, guided approach to building long-term wealth.