account type

Welcome to Managed Portfolios

Please select the option that applies to you.

New Customer

Existing Customer

Already started?

Sign in to finish

personal information

Personal Information

Provide your name and personal details to get started.

First Name

Last Name

Middle Initial (Optional)

Suffix (Optional)

Email

Phone Number

Date of Birth

Social Security Number

Continue

new customer login

Create Your Login

Enter a username and password for your new account.

Username

Password

Your password must contain:

- One uppercase letter
- One lowercase letter
- One number
- One symbol (#?!@$%^&*+-)
- 8 - 50 characters

Continue

financial information

Financial Information

Enter the following financial information.

Household Total Annual Income (?) v

Total Net Worth (?) v

Liquid Net Worth (?) v

Primary Source of Funds (?) v

Tax Bracket (?) v

Continue

select goal

Investment Goal

Select your investment goal. You can add more goals after setting up your account.

Emergency Fund
Build money to cover unexpected financial situations.

Retirement
Establish an IRA or taxable personal account for retirement.

Large Purchase
Finance a major purchase, such as a home, car or vacation.

Build Wealth
Have an opportunity to grow my money over time.

Continue

Ira account

Retirement Account

Select the type of retirement account you want.

Roth IRA Account
You can't deduct your contributions, but your investments grow tax-free and withdrawals aren't taxed in retirement.

Traditional IRA Account
You can generally deduct your contributions and won't be taxed until you withdraw your money in retirement.

Non-IRA Account
You can use a taxable personal investment account to save for retirement if you want more flexibility than an IRA account.

Continue

investing experience

Investing History

Select your level of investment experience.

Beginner
You consider yourself new to investing.

Intermediate
You have some experience investing.

Expert
You have a lot of experience investing.

Continue

Investing experience q1

Investment Objective

Select your investment objective for this goal.

Maximum growth potential

Strong growth potential/low income potential

Some growth potential/strong income potential

Some growth potential/preserve my investment

Continue

additional details 3 & 2

Additional Details

Provide additional details to finish setting up your investment account. Learn More

Employment Status v

Occupation v

Employer Name

Work Address Line 1

Work Address Line 2

Zip Code

City

State

Continue

Tooltip Content________________________________

We are required by the Securities and Exchange Commission (SEC) and the Financial Industry Regulatory Authority (FINRA) to ask for this information.

address information

Address Information

Enter your home address. You cannot use a P.O. Box for your home address.

Home Address Line 1 v

Home Address Line 2 v

Zip Code v

City v

State v

☐ My home address is different than my mailing address

Continue

Application Review

Please review the information you have provided. Select edit to make changes.

Selected Goal Edit

Retirement

Account:
Roth IRA

Age of Retirement:
65

Current Yearly Expenses:
$50,000

Risk Profile Edit

Risk:
Roth IRA

Portfolio:
65

Personal Information Edit

Name:
Ms. Maria Frank

Date of Birth:
01/21/1991

Social Security Number:
**** - ** - 2423

Email:
mauri@gmail.com

Mobile Phone Number:
(323)890-9090

Home Address:
123 Main St
Apt 3F
New York, NY 11215

review and open 4

Employment Information Edit

Employment Status
Employed

Occupation
Designer

Employer Name
Anderson Bank

Work Address
123 Main St
Apt 3F
New York, NY 11215

Financial Information Edit

Household Total Annual Income
$150,000

Total Net Worth
Between $50,000 - $100,000

Net Worth
$90,000

Primary Source of Funds
Source Answer

Tax Bracket
$75,000

Submit