# **Guided Investing vs. Wealth Advisor: What's right for me?**

Use this chart as a guide to help pick the investment path that is right for you.

# **Guided Investing**

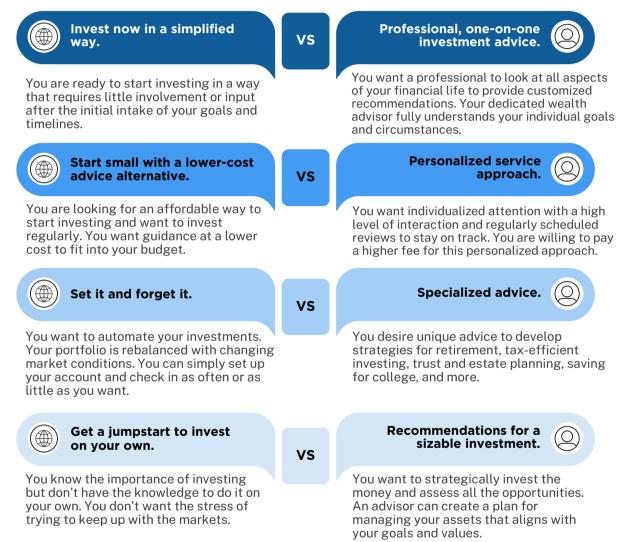
An automated digital tool that professionally manages your investments -- based on your risk tolerance and time horizon -- to help you reach your financial goals.

### Guided Investing is best if you are looking to:

## Wealth Advisor

A one-on-one relationship with an advisor who provides comprehensive financial planning and investment management services to help you reach your goals.

### A Wealth Advisor is best if you are looking for:



Guided Investing is an investment advisory service offered by Copper Financial Network, LLC ("Copper Financial"), an SEC registered investment adviser. Brokerage services for Guided Investing are offered by Copper Financial, member <u>FINRA/SIPC</u>. Copper Financial is a wholly-owned subsidiary of CommunityAmerica Credit Union ("CommunityAmerica"). Wealth Management by CommunityAmerica is a marketing name used by Copper Financial. CommunityAmerica and Wealth Management by CommunityAmerica are not broker-dealers or investment adviser.

See the <u>Guided Investing Wrap Fee Program Fee Brochure</u> for a full discussion of all associated fees and expenses. Account minimums and fees for products available through a Wealth Advisor vary by product. Please speak with a Wealth Advisor for detailed information.

All investing involves risk, including the possible loss of money you invest. Past performance is not a guarantee or indication of future performance.

For additional information on Copper Financial and Guided Investing please see our <u>Customer Relationship Summary</u>, <u>Guided Investing Wrap Fee Program Brochure</u>, and <u>Guided Investing Disclosures</u>.

If you have questions about Guided Investing, please contact us at digitalinvesting@cacu.com or 833.542.6509.

#### Investment and insurance products offered by Copper Financial:

Are Not Credit Union Deposits or Obligations	Are Not NCUA or Otherwise Federally Insured	Are Not Credit Union Guaranteed	May Lose Value
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