

Charlotte-Based Investment Advisory Firm Goes Hybrid

Metro Retirement Plan Advisors has reorganized as a next generation hybrid human/digital North Carolina Registered Investment Advisor (RIA).



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/EINPresswire.com/ -- For Immediate Release 2/13/2017 : Metro Retirement Plan Advisors

(www.myplanadvisor.com), based in Charlotte, NC has taken a major step towards digitizing its operations by reorganizing as a next generation hybrid human/digital Registered Investment Advisor (RIA).

According to Principal & CCO Wayne Bland, "The writing's on the wall." During an interview, Bland explained the main objective behind this move by the company. "To remain competitive, you must fully embrace and incorporate technology into your practice. Clients want more and expect this." We have entered an UBER, Amazon & iPhone era. He further added, "While the investment experience is simplified and automated, clients appreciate having a licensed human advisor a click or a phone call away."

Bland's statement definitely has substance, as My Private Banking Research expects 10 percent of worldwide assets, or \$16.3 trillion, to be managed by hybrid robos by 2025. In light of this, Metro Retirement Plan Advisors has partnered with Betterment to provide a secure, trusted platform and custodial services with more than \$7B in assets and over 100,000 customers.

"Moving to this new model allows us to better serve and add value to our business and retail clients," said Bland. "Most clients are well served virtually and they love it. We are now able to reduce investment cost and eliminate the transaction and annual fees that drag down investment returns."

The account opening process at the company is completely digital and a paperless IRA rollover can be completed in about 60 seconds. They also offer a revolutionary automated 401(k) plan for all size businesses.

On top of this, clients can sync all of their investment accounts and view them in one place through any device 24/7, including PC, tablet, or smartphone. Plus, video conferences can also be scheduled with advisors during non-traditional hours. In other words, the future of smart investing is here today.

Bringing some other new capacities of the company to light, Bland stated, "As fiduciaries, we

will only do what is in the best interest of our clients.” He further explained, “because we are fee-only, we avoid the appearance or potential for conflicts of interest by eliminating the sale of commission-based products. In short, we are completely transparent regarding fees and how we are compensated.”

About Metro Retirement Plan Advisors

Metro Retirement Plan Advisors is a fee-only North Carolina Registered Investment Advisor (and other jurisdictions where exempted) that specializes in 401(k)s, IRA and wealth management.

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