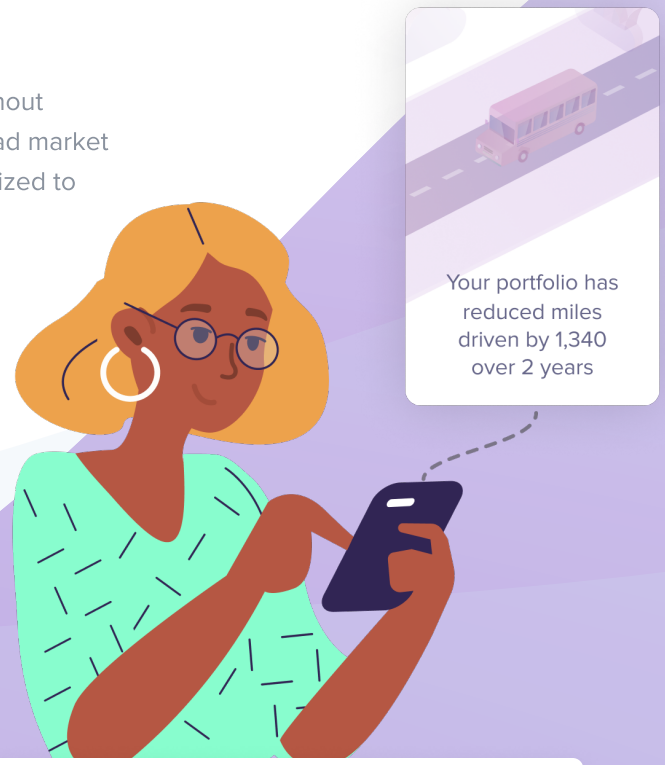
OpenInvest

Custom, Values-Aligned Portfolios

What Is OpenInvest?

OpenInvest is a technology-enabled professional asset manager that provides sophisticated, ESG-focused Separately Managed Account (SMA) capabilities that advisers can offer their clients.

We build bespoke portfolios that reflect your clients' values without sacrificing returns. Similar to ETFs, these portfolios provide broad market exposure, but unlike ETFs and other funds, they can be customized to align with your clients' values.



What We Offer

Impactful Reporting

Deliver transparent results that reflect the tangible impact your clients' investments have on the causes they care about. These reports help keep your clients engaged and allow you to connect with your clients on a unique new level.

Tax Optimization

We offer tax optimization for all taxable portfolios, no matter the size. This includes ongoing tax-loss harvesting and tailored tax transition analyses to avoid tax-intensive portfolio transitions.

User-Friendly, Proprietary Technology

Optimus, our portfolio management tool, allows you to build impact-focused portfolios for your clients. Our back-end technology allows you to minimize tracking error while maximizing the impact of your clients' investments.

Trusted ESG Data

High-quality data is closely examined and transformed into numerical scores assigned to each security. This data is both inclusive and exclusive. We source data from large data sources like Thomson Reuters, as well as trusted issue-matter experts.

Custom ESG Portfolios

Build tailored portfolios using individual stocks and fixed income funds that reflect your clients' values, all without sacrificing returns. We offer customization across over 20 environmental, social, and faith causes.