55ip

Tax Managed Index Strategies

Leverage intelligent automation to improve after-tax returns – powered by 55ip

Index investing with low-cost ETFs allows your clients to efficiently access or blend benchmark index exposures of their choosing. Tax managed index strategies offer the additional opportunity for significant incremental after tax returns and can highlight your value by offering a differentiated investment solution. With 55ip, implementing tax managed index strategies in-house is now possible to offer and implement across your client base.

55ip's investment strategy engine and disruptive tax technology allow you to deliver your own tax managed index strategies.

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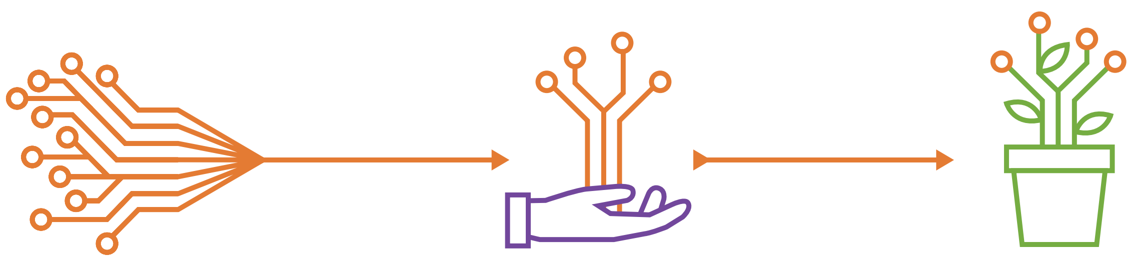
55ip TAX MANAGED INDEX STRATEGIES



- Lower cost and tax-efficient ETFs
- Sector and region exposures

- Personalized asset allocation
- Customized investment objectives

- Annual tax savings
- Enhanced after-tax returns

Investment Universe | **Client Strategy** | **Active Tax Mangement**

Powered by 55ip Intelligent Automation

55ip Features and Benefits

Active Tax Management

Automated monitoring - Client accounts are actively monitored to harvest losses when appropriate to lower each client's tax bill.

Lower tracking error - 55ip's machine-learning tax technology replaces harvested positions with ETF proxies while maintaining strategy objectives.

Intelligent Construction

Choice of ETFs - Leverage 55ip's fund selection algorithms for a simplified investment experience. Easily pick relevant exposures for low cost ETFs, customized by custodian, that can save on trading activity, fund and transaction fees.

Customize at scale - Advisors can address each client's unique objectives and risk tolerance by easily creating custom portfolios using a single index or blended across indices, across US and international equities and bonds.

Trade and Rebalancing

Straight through processing - Automated trade generation and execution module allow you to deliver tax-managed index strategies as custom SMAs directly in your client's custody account.

Portfolio Transition and Withdrawal

Tax-aware transfers - Facilitate tax-aware transition of client assets into your strategies and tax-aware withdrawals while adhering to tax budgets and strategy objectives.

Getting Started

Minimum investment	Annual advisory fee
$50,000	0.20%–0.40% (varies based on total assets invested)

Contact us at info@55-ip.com or visit www.55-ip.com to learn more.

About 55ip

55ip's investment strategy engine enables financial advisors and wealth managers to both own and automate their investment strategies, fueling a differentiated value proposition while freeing critical time to focus on client relationships. With 55ip, advisors are able to seamlessly incorporate sophisticated quantitative capabilities and scalable portfolio implementation into your practice, facilitating the entire investment management workflow, from client-level strategy customization for lower fees, taxes and risk of extreme losses through trade execution.

Disclosures

55ip is the marketing name used by 55 Institutional Partners, LLC, an investment technology developer, and for investment advisory services provided by 55I, LLC, an SEC-registered investment adviser. Such registration does not imply a certain level of skill or training. These materials are intended for Registered Investment Advisors only and describe a risk management strategy that may not work as intended, in part because the strategy is not modified more frequently than monthly. As a result, the strategy cannot be counted on to provide protection to client portfolios. Even when using the strategy, portfolios remain subject to multiple risks, including the risk of loss of the entire amount invested.

All investments involve risk, including loss of principal. The impact of a tax-loss harvesting strategy depends upon a variety of conditions, including the actual gains and losses incurred on holdings and future tax rates. The results shown in these materials are hypothetical and do not represent actual investment decisions, but instead were achieved by the retroactive application of a model designed with the benefit of hindsight. Note that the benefit is shown by applying the highest marginal tax rate, which may be higher than that of an actual investor and that tax rates change over time.

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