

DISCOVER THE ALL-NEW

SMARTX TAX IMPACT CALCULATOR AND THE SMARTX REBALANCER

Make Better Decisions Faster with Data-Driven Workflows and Tax Impact Analysis



With the SMARtX Tax Impact Calculator and SMARtX Rebalancer, financial advisors no longer need to comb through multiple systems to uncover meaningful tax insights and portfolio analysis—it's all available right in the SMARtX application.

Designed to streamline advisor decision-making by surfacing advanced analytics, the SMARtX Rebalancer empowers advisors with control over after-tax outcomes for clients while gaining operational efficiency in their day-to-day operations.



Control After-Tax Outcomes

More quickly and confidently make decisions to deliver results for your clients.



Gain Operational Efficiency

Streamline the gathering and analysis of data to inform day-to-day rebalancing activities.



Ease the Burden of Manual Processes

Streamline historically cumbersome processes by consolidating data in a single application.

KEY FEATURES

Data-Driven Workflows

Use data analytics to identify accounts for rebalancing based on position and cash drift, model updates, and more.

Insightful Analytics

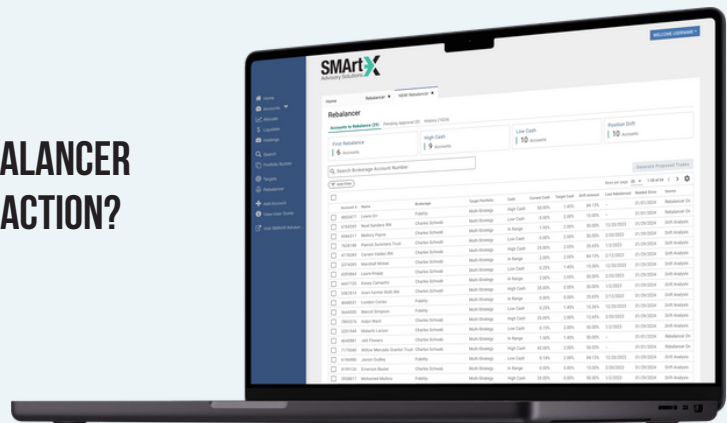
Gain deeper insights that enable decision-making to improve your productivity and optimize results for your clients.

Tax Impact Analysis

Analyze after-tax outcomes for clients, efficiently managing the tax bill associated with rebalancing accounts in order to control after-tax returns.

WANT TO SEE A DEMO OF THE SMARTX REBALANCER AND SMARTX TAX IMPACT CALCULATOR IN ACTION?

Book a time to talk to us by scanning the QR code below.



ABOUT SMARTX ADVISORY SOLUTIONS

SMARtX is revolutionizing managed account administration in wealth management.

Through cutting-edge technology that automates investment processes and simplifies client account management, it's the future-forward solution for advisory firms, asset managers, TAMPs, and custodians seeking to defy the limitations of managed account technology as it exists today.

[Modernize asset management with SMARtX: The Foundation of Innovation](#)



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