



Intelligent Tax Optimization

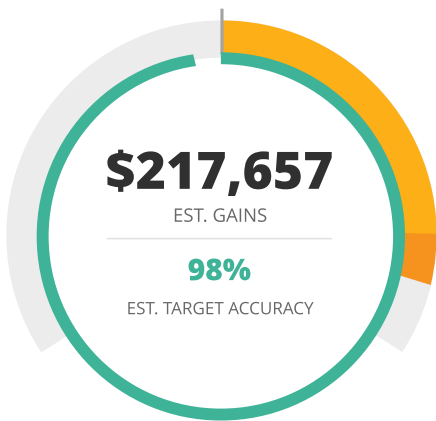
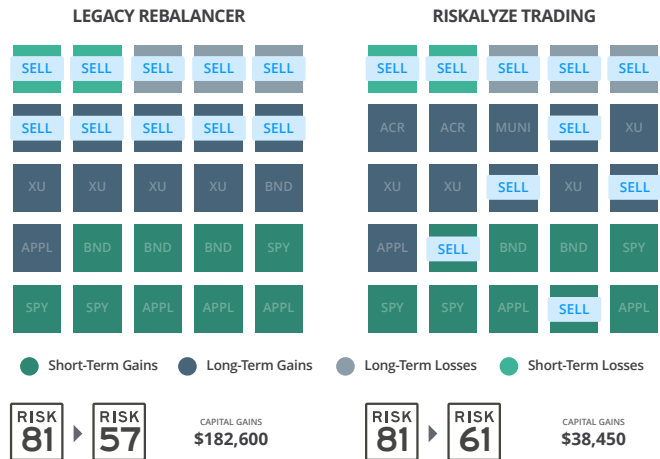
Intelligent Tax Optimization empowers you to optimize every trade decision for your clients and keep taxable accounts on target while minimizing taxes.

⚡ Available with Riskalyze Trading

Save your clients thousands in tax bills across your book.

With Intelligent Tax Optimization, you can become your client's tax superhero. The Riskalyze Trade engine runs millions of scenarios to find the perfect number of shares to sell from the precise tax lots to get your clients as close to their Risk Number target as possible, all while staying within your capital gains budget.

Since the inception of Intelligent Tax Optimization, the average advisor saves \$43k in taxes across their book of business and one advisor has even saved more than \$800k. Talk about clients that don't mind paying advisory fees with a tax efficient portfolio.



Now you control the capital gains budgets.

No matter how complex your client's tax situation is, the Riskalyze Trading engine always keeps you in control and allows you to set capital gains budgets for every scenario.

Whether you want to allow all capital gains, avoid short-term gains, avoid short-term and long-term gains, or enter your own capital gains budget, our trading engine will do all of the hard work for you. When it's time for portfolio rebalancing, it's as simple as a click to queue those trades into your trading inbox.

LEARN MORE AT [RISKALYZE.COM/TRADING](https://www.riskalyze.com/trading)



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