



# Navigating 2024: Politics, Policies and Portfolios

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## Prepare for Any Result

Over the next year, election uncertainty will likely spur client concerns about volatility and possible tax legislation. As a leader in tax-managed investing, we can help you keep them well informed and positioned throughout the cycle and beyond.

### EXPERTISE

## Navigating the 2024 Election

Webinar series featuring Strategas' Dan Clifton, who leads the #1 ranked Washington policy research team on Wall Street\*

### Live Event Dates

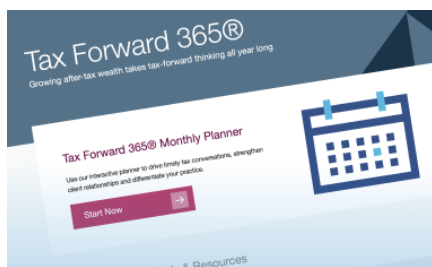
- December 12, 2023: Pre-Iowa Caucuses
- February 27, 2024: Pre-Super Tuesday
- May 21, 2024: Pre-Conventions
- September 10, 2024: Pre-Election
- November 19, 2024: Post-Election

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### RESOURCES

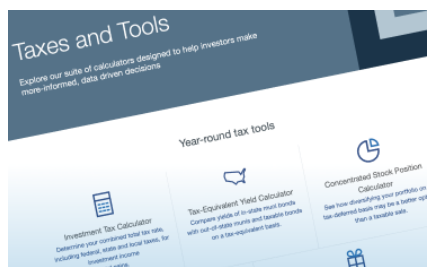
## Plan and Prepare Tax Aware



## Investment Tax Center

Year-round planning resources, strategies and tools to help you maximize your clients' after-tax growth potential.

[EXPLORE](#)



## Interactive Tax Tools

Suite of calculators that show clients how taxes impact their investments and opportunities for greater tax efficiency.

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## Tax Education Center

Topical, multimedia resources designed to help drive after-tax client conversations and differentiate your practice.

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### RECENT INSIGHTS

#### Taxes

[Should the world's richest taxpayers pay more to combat climate change, poverty?](#)

May 6, 2024

"The finance ministers of Brazil and France have called for a tax on U.S. dollar billionaires of at least 2% of their wealth each year, hoping to shore up \$250 billion to combat poverty, hunger and climate change."

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#### [After-Tax Advisor](#) | Elections

[Talking Tax Reform? Stick with the Facts](#)

May 15, 2024

"The one thing we know for certain is that tax laws are likely to change to help lower the national debt."

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### SPOTLIGHT STRATEGIES

## Personalize and Optimize Tax Efficiency

## Parametric Custom Core®

An innovative direct indexing platform that allows clients to build customized portfolios and apply active tax management to help maximize after-tax results.

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## U.S. Charitable Gift Trust®

A tax-exempt public charity offering donor-advised funds and other tax-advantaged charitable giving strategies, including U.S. Legacy Income Trusts®.<sup>1</sup>

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## Parametric Fixed Income

A full suite of customizable laddered, managed and responsible solutions to help clients navigate complex markets and improve after-tax performance.

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\*Institutional Investor, 2022

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