



## TAX FORWARD ■ 365®

### Employ Tax Management Strategies

Left unchecked, taxes can erode portfolio returns, diminish disposable income and impact wealth longevity. That's what makes tax-managed investing an important part of a sound financial plan.

### How we can help

[TOOLS & CALCULATORS](#)[SPOTLIGHT STRATEGIES](#)[ACTIONABLE INSIGHTS](#)[ADVISOR RESOURCES](#)

### TOOLS & CALCULATORS

Show clients how ladder portfolios may perform in different interest rate environments. For ladder municipal bond portfolios, the calculator also indicates the potential value of systematic tax-loss harvesting in a rising interest rate environment.

[LADDERED INVESTING INTEREST RATE  
SCENARIO CALCULATOR](#)[ACCESS MORE TAX FORWARD TOOLS](#)

### SPOTLIGHT STRATEGIES

Parametric makes it easy for you to deliver tax- and risk managed portfolios tailored to your clients' needs, all in a simple, scalable way.

Learn about Parametric Custom Core  
portfolios.

[VIEW BROCHURE](#) ►



## ACTIONABLE INSIGHTS

Focus and reinforce your client conversations with practical, relevant commentary.

Helping Clients Keep Their Earnings with Tax-Managed Core-Satellite Portfolios

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What Is Tax Management?

[VIEW BLOG](#) ►



## ADVISOR RESOURCES

Dive deeper into our spotlight strategies and stay on top of market trends.

Muni market Flash Update  
with Nisha Patel, CFA

[WATCH VIDEO](#) ►

with a proven leader:  
Parametric Custom Core® delivers

[VIEW FLYER](#) ►

Parametric TABS Municipal Ladders:  
Year-round tax-loss harvesting elevates  
after-tax return potential

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Partner

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