
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 laddered portfolios may perform in different interest rate environments. For laddered 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.

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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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with Nisha Patel, CFA

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