



# CUSTOM INDEXING

*Revolutionizing the Way We Invest*

## WHAT IS CUSTOM INDEXING?

With the advancements of commission-free trading, new software, and fractional shares on the horizon, we can now build diversified portfolios of individual stocks customized to your needs and preferences.

This new technological solution, known as custom indexing, allows us to decouple traditional fund structures to align your portfolio to your needs and values.

## WHO IS ELIGIBLE?

While custom indexing offers you some great advantages in selecting individual stocks, it is most appropriate for clients that meet certain account minimums and qualifications due to tax and cost considerations. To qualify for custom indexing, you ideally have:

- ✓ \$500K or more to invest
- ✓ Taxable non-retirement account
- ✓ High income tax bracket
- ✓ Cash & existing securities

## WHAT ARE THE BENEFITS?



Direct Stock  
Ownership



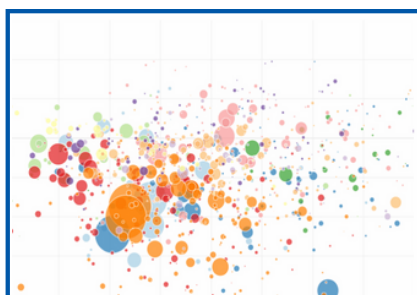
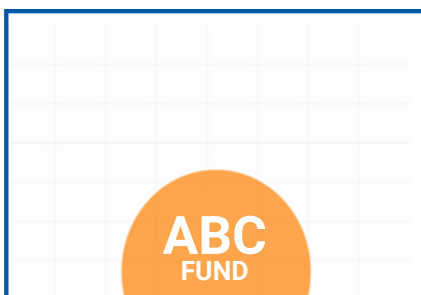
Optimize After-  
Tax Return



Fully  
Customizable

## CONCENTRATED PORTFOLIO VS INDEX

Custom indexing unbundles one-size-fits-all funds to unlock additional capabilities.

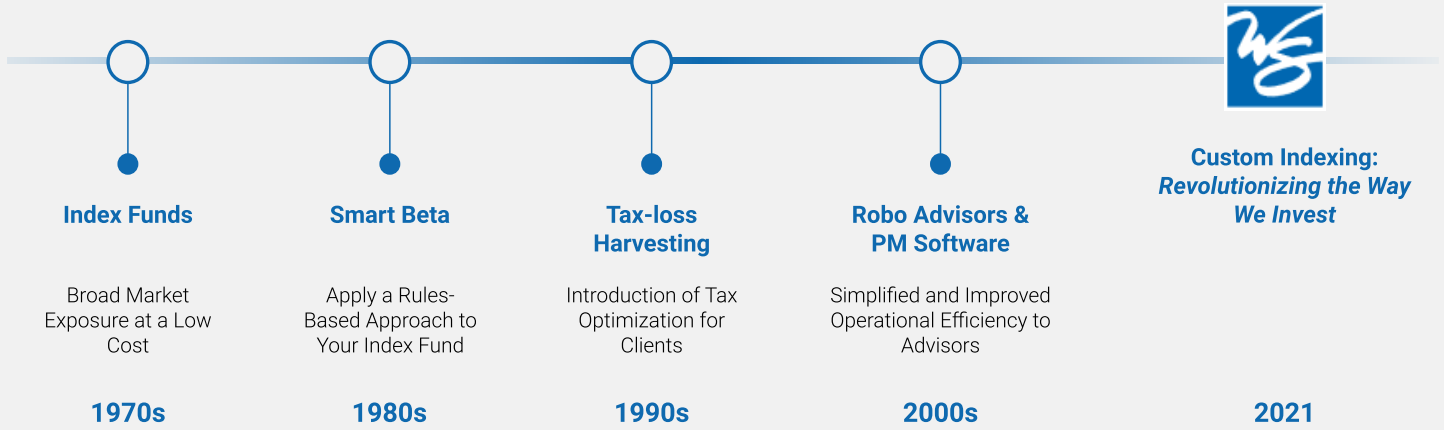


A traditional fund will house hundreds of securities. Custom indexing decouples this fund structure and allows you to own the underlying stocks directly, allowing for more robust tax management and optimization.



# THE FUTURE OF PORTFOLIO MANAGEMENT

Warren Street's investment philosophy, process, and experience can now be delivered through our new custom indexing platform, redefining what's possible and creating the ultimate client experience.



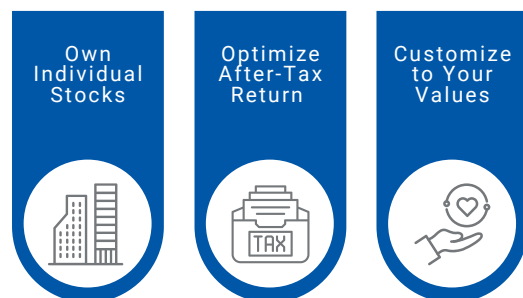
## THE PROCESS IS EASY WITH SIMPLE STEPS

- 1 Review your current portfolio.
- 2 Identify opportunities.
- 3 Establish a tax budget.
- 4 Transition to custom indexing.

If custom indexing is a good fit for you, your advisor will discuss your goals, preferences, risk tolerance, and tax positioning. Then, they will help you design your custom portfolio from scratch, based on considerations such as asset allocation, factor exposures, and tax budgeting.

## CUSTOMIZE TO YOUR PREFERENCE AND VALUES

We have the ability to incorporate Environmental, Social, and Governance (ESG) considerations for your portfolio. We can exclude specific industries and companies or tilt your stock ownership to companies addressing issues you care about.



## BOOK A FREE CONSULTATION TODAY!

Schedule a complimentary review of your current portfolio to see if you qualify for custom indexing. We promise to put your best interests first. Your free retirement consultation is your chance to discuss your real retirement concerns with a member of our team.

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