

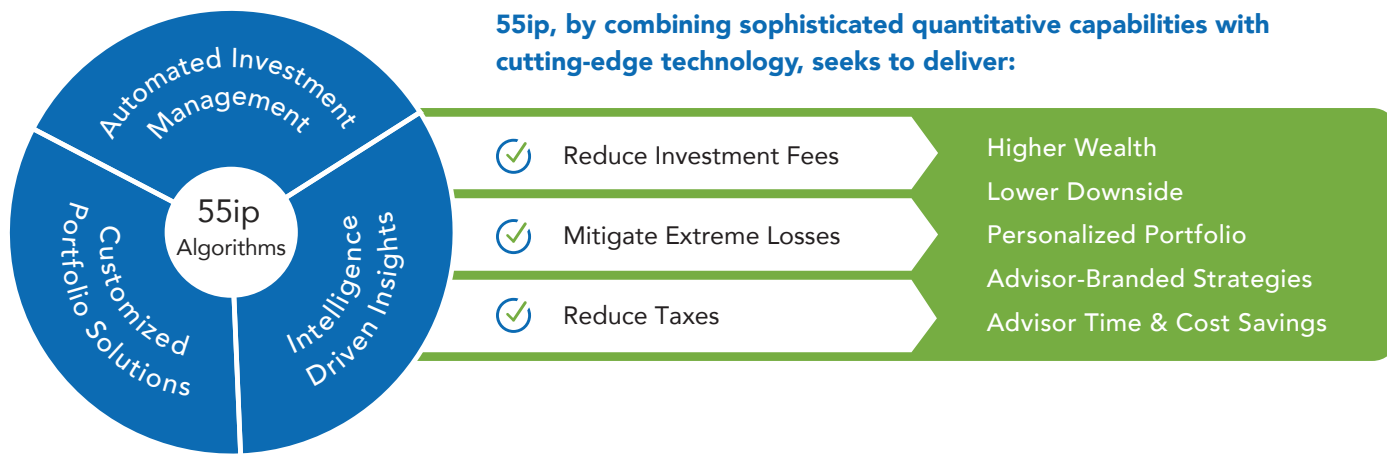
55ip: Powering the Future of Wealth Management

Your clients want to steadily grow their wealth so that it carries them through retirement and beyond. At 55ip, we offer a compelling, easy-to-use investment strategy engine that combines advanced quantitative methods and cutting-edge technology to help you add a new level of value to your investment management offering.

We don't just provide you with tools for you to manage yourself. Instead, we have built proprietary algorithms directly into our platform to automate sophisticated capabilities. Our goal is simple: reduce investment frictions and improve outcomes.

What is the 55ip edge?

- ▶ **Intelligence-Driven Insights:** Our investment strategy engine harnesses proprietary and contemporary financial research to inform every major decision that you need to make – from fund selection and asset allocation to portfolio construction, tax management and trading. We can help you:
 - **Reduce Investment Fees:** Our fund selection algorithms identify opportunities to lower underlying product fees and trading costs so that you can help your clients achieve better returns.
 - **Mitigate Extreme Losses:** Our portfolio construction algorithms rebalance your clients' portfolios to ever-changing market conditions, enabling them to be appropriately diversified while seeking to reduce the risk of a significant loss event.
 - **Reduce Taxes:** Our tax management algorithms automatically optimize for after tax-returns, helping you transition clients into your strategies, efficiently rebalance while harvesting tax losses, and reduce capital gains.
- ▶ **Automated Investing:** Our investment strategy engine gives you the option to manage your client's portfolio by automating all, or part of, the core functions — so that portfolios will dynamically adjust whenever market conditions change. We help you deliver better outcomes to your clients while freeing up the time you need to grow your business and build your brand.
- ▶ **Customized Investing:** Our investment strategy engine is never one-size-fits-all. We allow you to design your own branded investment strategies or construct a more personalized portfolio for your clients that adjusts for the exposures your clients may want or already have through their existing holdings.



To learn more, please contact us at info@55-ip.com or **617.960.9559**.

Intelligent. Custom. Automated.
www.55-ip.com

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