

Effortless Access to Tax-Optimized Investing

Vestmark VAST simplifies taxefficient portfolio management
by offering seamless onboarding
and transition services. Whether
you're transitioning existing
accounts or setting up new
ones, our structured process
ensures a smooth experience
with minimal disruption.

Why Choose Vestmark VAST?

- Effortless Onboarding
 Step-by-step support
 from contracting through
 account inception
- Seamless Integration
 Integrated with leading custodians like Charles
 Schwab and Fidelity
- Tax-Optimized Investing Multi-asset overlay management with accounts reviewed daily for tax-loss harvesting opportunities
- Dedicated Support
 Advisory consultants
 accessible at every phase

Your VAST Transition in 5 Simple Steps

- Kick-off & Initial Setup
 Sign one sub-advisory agreement and gain access to your VAST portains.
 - and gain access to your VAST portal. A dedicated team guides your onboarding and training.
- 2. Build Your Investment Experience
 Assign team logins and configure
 your models. Use Vestmark strategies,
 preferred managers, or your own.
- 3. Transition Analysis & Account Funding
 Set the funding method and customize
 client tax preferences. Choose from
 three transition scenarios per analysis.
- 4. Account Setup & Linking

Assign Vestmark VAST as the manager at your custodian. We link each account to the specifics on the client's transition analysis.

Go-Live & Ongoing Optimization
 Accounts go live with daily tax-loss harvesting and monitoring. Ongoing support and platform enhancements are included.



FAQ:

What Advisors are Asking

How do I know if my models are up to date?

Vestmark VAST is a real-time, dynamic platform. Any updates made to your models are automatically reflected in the system, including the transition analysis portal and linked client accounts. You can be confident that your model updates flow through immediately and accurately—no delays, no manual steps required.

How long does the onboarding process take?

Onboarding is efficient and streamlined. Most firms are up and running in one week. The process includes a kickoff call, UI setup, transition analysis, and live account linking—all guided by a dedicated Vestmark team.

Will we need to repaper clients?

No. A single sub-advisory agreement is executed between your firm and Vestmark. Clients do not need to sign any additional paperwork, making the process fast and frictionless.



Largest independent UMA provider

Chosen by 6 of the top 10 managed account program sponsors



Simple, intuitive interface

With SMAs, ETFs, and MFs, in one account

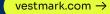


Access 220+ Managers & 1,300+ Strategies

Or use your own custom models

Start Your VAST Transition Today

Unlock the power of personalized tax-efficient investing with a streamlined onboarding process.



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Investment strategies that seek to enhance after-tax performance may be unable to fully realize strategic gains or harvest losses. Tax-loss harvesting involves the risks that the new investment could perform worse than the original investment and that transaction costs could offset the tax benefit.

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