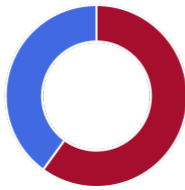


## Taxficient SCORE

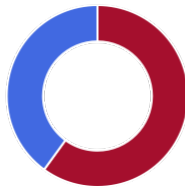
A Taxficient score measures the tax efficiency of an investment portfolio, on a scale from 0 to 100. A score of 100 means giving up as little as possible in taxes on investment returns leading to a higher balance over time.

### Your Current Portfolio

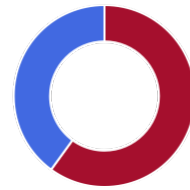
A portfolio is typically made up of multiple holdings and multiple accounts. Your Taxficient score is calculated by looking at your existing portfolio and determining the anticipated investment taxes due, based on the type of account in which the assets are held. Here is the portfolio information you have provided so far.



Taxable Balance  
\$600,000



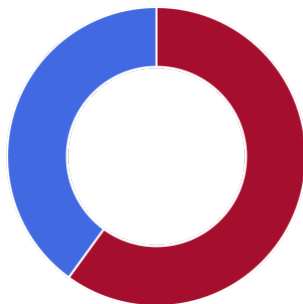
Tax-Deferred Balance  
\$400,000



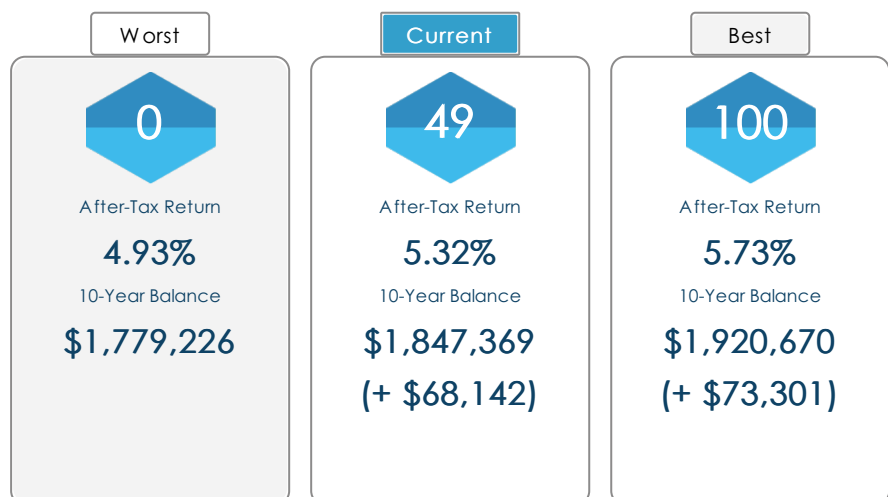
Tax-Free Balance  
\$100,000

### Your Taxficient Score

The tax rates used in evaluating your portfolio were 30.00% for ordinary income, and 20.00% for long-term capital gains. When deciding how to distribute your desired assets across the accounts you have available, taxes play a big part in how your portfolio grows over time. Taxes are inevitable, but minimizing them makes sure your assets are free to grow as efficiently as they can. Maintaining a Taxficient score as close to 100 as possible helps keep your portfolio on track by avoiding unnecessary taxes.<sup>1</sup>



Portfolio Balance  
\$1,100,000



<sup>1</sup>The Taxficient Score is provided for informational purposes only and should not be considered as investment advice.