

SMARtX

Powering the *Future* of Managed Account Technology

Key Value Drivers

Unified Infrastructure for Scale & Operational Efficiency

SMARtX consolidates portfolio management, tax optimization, UMA functionality, billing, & API infrastructure into a seamless platform, so institutions can eliminate redundant systems, reduce manual effort, & scale highly personalized strategies without operational drag.

Seamless Integration Across Tech Stacks

Built on a custodian neutral, API-first foundation with modular web components, SMARtX connects your full tech stack without disruption to speed up onboarding, simplify compliance, & future-proof your platform.

Freedom to Innovate & Differentiate

Break down legacy system constraints to deliver a truly differentiated offering by building personalized client experiences, launch new business lines, or distribute proprietary models—all without rebuilding your infrastructure.

Core Capabilities



Advanced UMA Infrastructure

Rep-directed, model-traded, manager-traded, tax- transition, cash management, & protected sleeves—all within a single account.



Scalable Rebalancing

Align rep-directed and model portfolios with client objectives while SMARtX's rebalancer previews capital gains, enabling smart, tax-aware decisions at scale



Robust Manager Marketplace

Access leading third-party asset managers and strategies—fully integrated and ready to deploy.



Flexible Integration Options

Use SMARtX's native interface or embed capabilities directly into your platform via modular, modular web components & API-driven architecture.



Comprehensive Tax Tools

Full suite of tools for tax transition analysis & management, impact-aware rebalancing, & tax-loss harvesting to help drive after-tax performance.

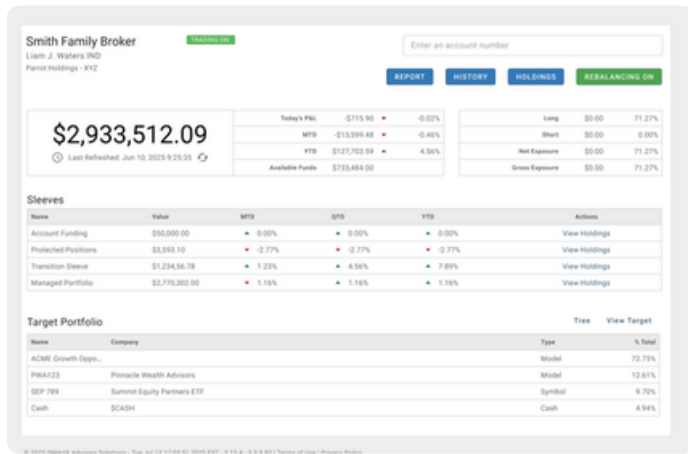


Proprietary Model Distribution

List broadly on the Manager Marketplace or run fully white-labeled solution exclusively for your own client base. Trade in-house or outsource execution.

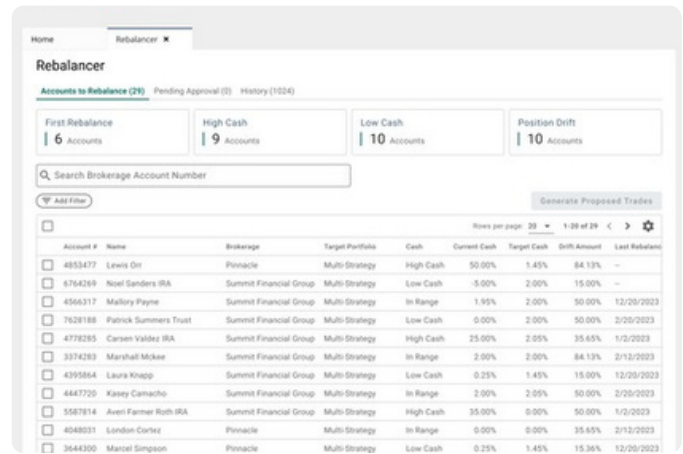
UMA Account Structure

Account-level view featuring multiple sleeve types.



Rebalancer

Rebalance initiated across multiple account & target portfolios.



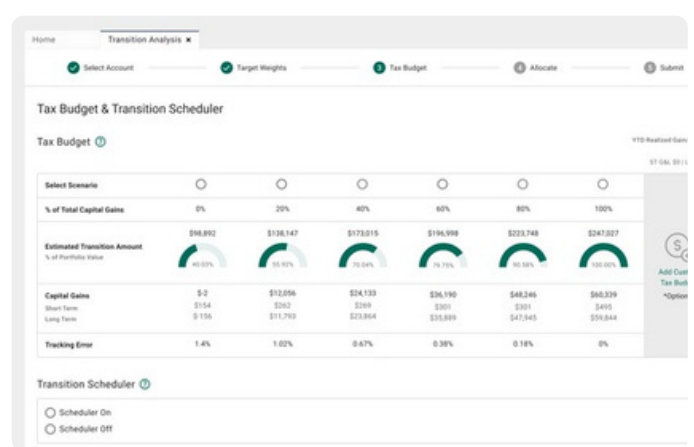
Proposal Construction

Uma proposals dynamically generated via portfolio construction



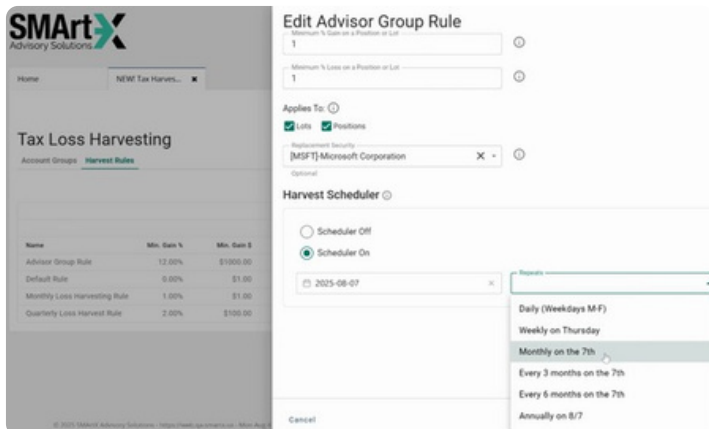
Tax Transition Management

Analyze, configure, and implement a tax transition plan aligned to a capital gains budget



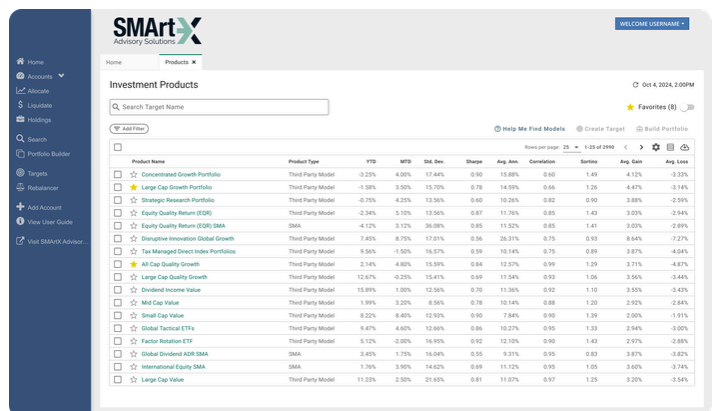
Tax Loss Harvester

Automated solution for identifying and executing harvesting opportunities across households and accounts.



Manager Marketplace

View of available managed investment products.



All images are SMartX Platform mockups and do not include real client data and/or information