

Scivantage Maxit

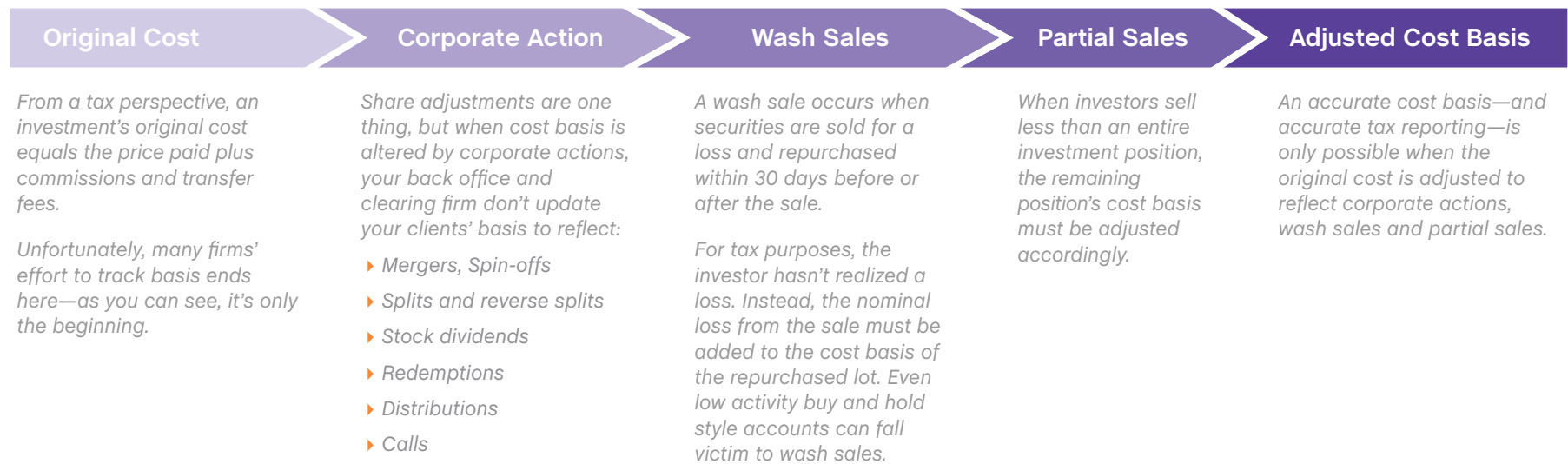
Premier Cost Basis, Tax Management and Portfolio Reporting Solution



Maximize Portfolio Performance—Deliver Accurate, Adjusted Cost Basis to Gain a Competitive Edge

With more than 7,500 corporate actions each year and countless other portfolio transactions to monitor, making informed portfolio investment decisions has become an ever-growing challenge for investors and financial advisors. Traditionally, many firms have only tracked the original cost of their clients' investments, but leading investment advisors, brokerages and other financial institutions recognize original cost can only go so far. True tax efficient portfolio management requires the precise tracking of adjusted cost basis—taking into consideration portfolio shifts that occur due to corporate actions, partial lot sales and even, wash sales.

Adjusted Cost Basis vs Original Cost Basis



High stakes—for your clients and your business

Failing to accurately track adjusted cost basis exposes clients to:

- ▶ Flawed investment decisions driven by a poor understanding of the tax consequences
- ▶ Underpaying taxes—with penalties and interest due when the error is discovered
- ▶ Paying too much tax
- ▶ The hassle of filing amended returns to correct mistakes
- ▶ Missed opportunities to effectively use tax management techniques
- ▶ Weaker after-tax performance due to unnecessarily high tax liabilities.

The risks don't stop with your clients. By exposing them to unpleasant surprises and potentially expensive mistakes, an incomplete approach to tracking cost basis also threatens your ability to retain accounts and build assets.



Scivantage Maxit: Adjusted cost basis made simple

There's no doubt about it—adjusted cost basis is a complicated concept. Fortunately, we've already cracked the code and created a solution that makes it simple for your firm to start tracking it accurately.

It's Scivantage Maxit, a web-based application that meets the needs of advisors, home office support specialists and individual investors alike. Say goodbye to manual processes for monitoring and updating client accounts: Maxit provides an automated solution that provides accurate, timely investment information you won't find anywhere else—all in real-time.

Implementation is easy, thanks to Maxit's open, flexible architecture that easily integrates with all major back offices and third-party software solutions. Deploy Maxit and you'll immediately benefit from:

- ▶ A single platform that covers virtually every security
- ▶ Automated, real-time cost basis adjustments to reflect corporate actions, wash sales, partial sales and more
- ▶ Eliminating time-consuming, labor-intensive manual processes
- ▶ Prompt updates that keep pace with the ever-changing tax code
- ▶ Scivantage's unmatched cost basis expertise

More than tax compliance—it's tax intelligence

Having a clear grasp of your clients' adjusted cost basis is about much more than an accurate Schedule D—it's critical to making timely investment decisions with a full appreciation of the tax consequences.

Scivantage Maxit isn't just a cost basis system—it's also an investment decision support tool that lets you test various portfolio moves and model the tax results in advance. No more spreadsheets and manual calculations—Maxit does all the work for you. In short, Maxit gives you the insight you need to make intelligent and effortless tax decisions.

Turn the cost basis challenge into business opportunity

Scivantage Maxit offers a powerful new way to distinguish yourself from the competition and elevate the quality of service you provide to your clients. Ready to learn more? Visit scivantage.com or call us at 866.724.8268.



Scivantage Maxit provides the most complete, automated cost basis and portfolio tax reporting system available.