



The Next Evolution in Tax-Efficient Investing

Introducing new ways to generate tax benefits, manage concentrated wealth, and prepare for future capital gains



As wealth evolves, tax efficiency becomes an increasingly important driver of long-term investment outcomes. Direct indexing has gained traction as a core strategy—combining market exposure with tax-aware portfolio management—and its latest evolution takes this approach further. In this session, we’ll introduce Direct Indexing 3.0, which incorporates a levered long/short framework designed to enhance after-tax return potential while creating more opportunities for tax-loss realization.

We’ll also explore how investors are using this approach to:

- Diversify concentrated, low-basis holdings

Thursday, June 18
2:00 - 2:45pm ET

RSVP by
Wednesday, June 17
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more tax efficiently

- Deploy capital following a liquidity event while compounding wealth in a tax-aware manner
- Reinvigorate mature taxable or direct indexing portfolios where tax benefits have diminished
- Prepare for future capital gains by building a more flexible, tax-aware portfolio in advance of anticipated events

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