SMArtX Advisory Solutions

SMARTY

Built for *Smarter* Portfolio Management

How SMARTY Transforms Your Practice

Simplifies Operations

At the core is UMA infrastructure that consolidates multiple strategies into a single account—no more juggling platforms, custodians, or workflows.

Delivers Built-In Tax Alpha

Advanced tools for tax transitions, tax impact rebalancing, and tax loss harvesting are designed to support better after-tax outcomes—without added complexity.

Scales With You

Enterprise-grade rebalancing and automation tools give you full control across hundreds or thousands of accounts—on your terms.

Core Capabilities

Advanced UMA Flexibility

Rep-directed, sponsored models, 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.

Manager Sponsored Marketplace

Direct access to third-party products, including ETFs, mutual funds, equities, alternatives, direct indexing, interval funds, and fixed income investment vehicles.

Comprehensive Tax Tools

Tools for tax-loss harvesting (TLH), tax transitions, and tax impact rebalancing—designed to provide insights that help you evaluate and manage after-tax outcomes.

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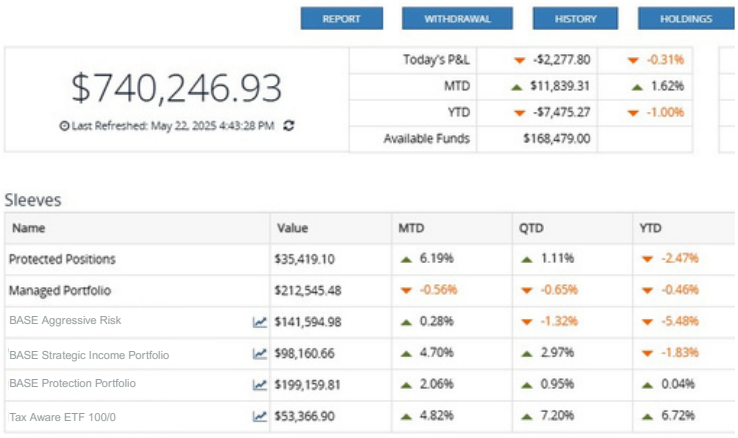
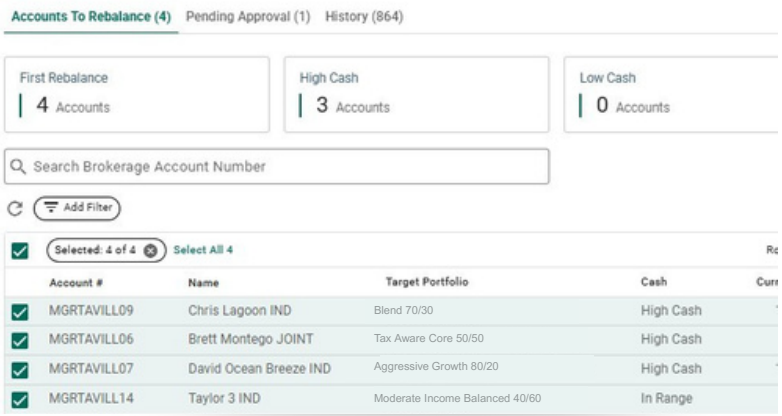
UMA Account Structure

Account-level view featuring multiple sleeve types.



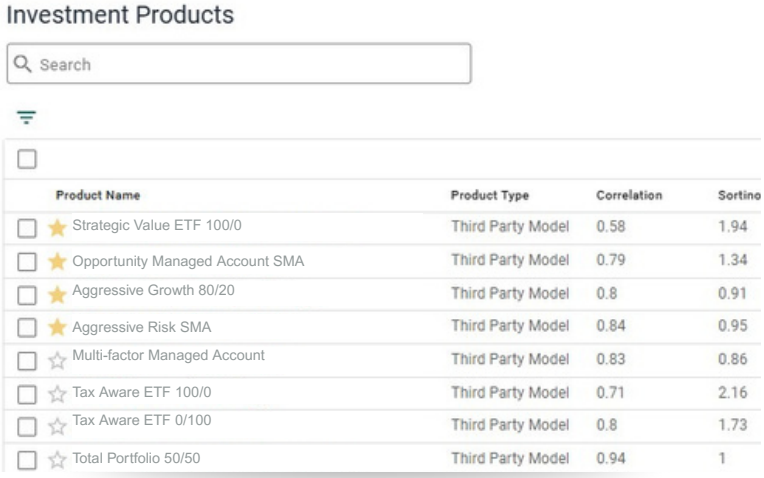
Rebalancer

Rebalance initiated across multiple account & target portfolios.



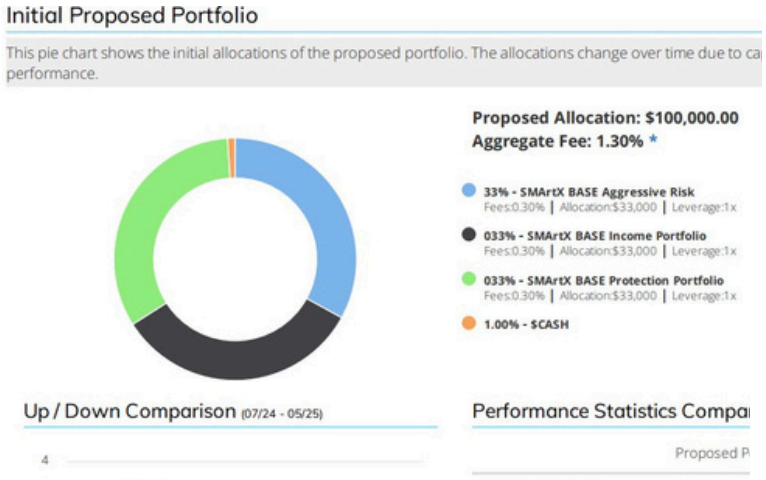
Manager Marketplace

View of available managed investment products.



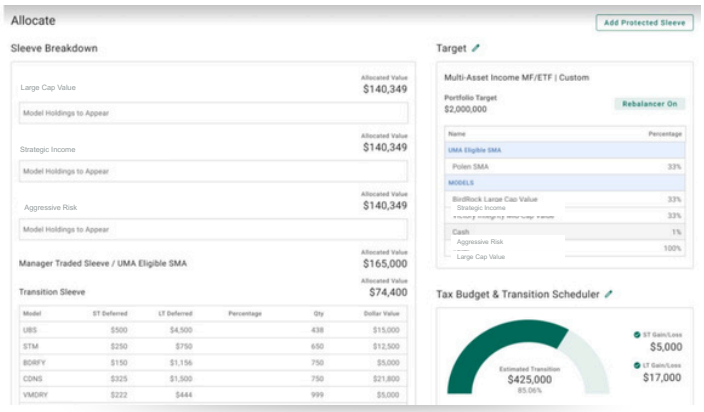
Proposal Generation

UMA proposal built from a selection of model portfolios.



Tax Transition Analysis

Preview a tax transition scenario aligned with the target capital gains budget.



Model Comparison

Comparison of account holdings to models with the greatest overlap in positions.