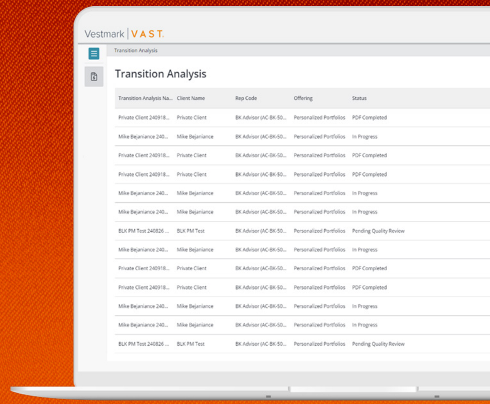
Vestmark

Effortless Access to Tax-Optimized Investing



ONBOARDING & TRANSITION PROCESS

Vestmark VAST simplifies tax-efficient portfolio management by offering seamless onboarding and transition services. Whether you're transitioning existing accounts or setting up new ones, our structured process ensures a smooth experience with minimal disruption.

Why Choose Vestmark VAST?

- **Effortless Onboarding**
  Step-by-step support from contracting through account inception
- **Seamless Integration**
  Integrated with leading custodians like Charles Schwab and Fidelity
- **Tax-Optimized Investing**
  Multi-asset overlay management with accounts reviewed daily for tax-loss harvesting opportunities
- **Dedicated Support**
  Advisory consultants accessible at every phase

Your VAST Transition in *5 Simple Steps*

1. Kick-off & Initial Setup

Sign one sub-advisory agreement and gain access to your VAST portal. A dedicated team guides your onboarding and training.

2. Build Your Investment Experience

Assign team logins and configure your models. Use Vestmark strategies, preferred managers, or your own.

3. Transition Analysis & Account Funding

Set the funding method and customize client tax preferences. Choose from three transition scenarios per analysis.

4. Account Setup & Linking

Assign Vestmark VAST as the manager at your custodian. We link each account to the specifics on the client's transition analysis.

5. Go-Live & Ongoing Optimization

Accounts go live with daily tax-loss harvesting and monitoring. Ongoing support and platform enhancements are included.

What Advisors are Asking

How do I know if my models are up to date?

Vestmark VAST is a real-time, dynamic platform. Any updates made to your models are automatically reflected in the system, including the transition analysis portal and linked client accounts. You can be confident that your model updates flow through immediately and accurately—no delays, no manual steps required.

How long does the onboarding process take?

Onboarding is efficient and streamlined. Most firms are up and running in one week. The process includes a kickoff call, UI setup, transition analysis, and live account linking —all guided by a dedicated Vestmark team.

Will we need to repaper clients?

No. A single sub-advisory agreement is executed between your firm and Vestmark. Clients do not need to sign any additional paperwork, making the process fast and frictionless.

Largest independent UMA provider

Chosen by 6 of the top 10 managed account platforms

Simple, intuitive interface

With SMAs, ETFs, and MFs, in one account

Access 220+ Managers & 1,300+ Strategies

Or use your own custom models

Start Your VAST Transition Today

Unlock the power of personalized tax-efficient investing with a streamlined onboarding process.

Contact us today to learn more

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