



Automated Tax Loss Harvesting

Trading scans every one of your client accounts every night looking for harvesting opportunities over your dollar or percentage threshold ensuring you can save on client tax bills.

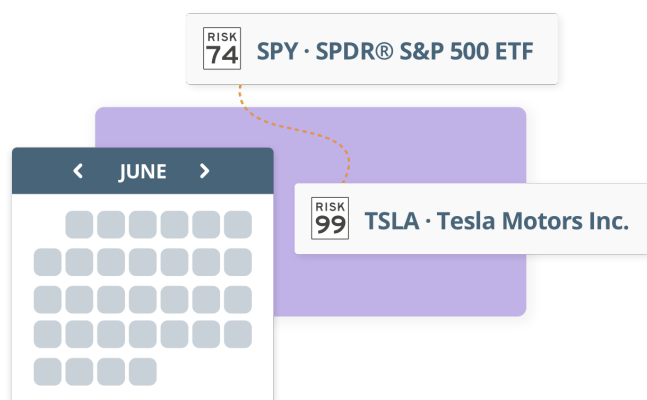
- Elite
- Ignite
- Ultimate
- Trading

Monitor every account for tax loss harvesting opportunities and more.

With Automated Tax Loss Harvesting, Trading will monitor every taxable account that you manage and look for opportunities to realize capital losses over your dollar or percentage threshold.

And while most rebalancers harvest losses whenever a position loses a percentage of its principal value, Automated Tax Loss Harvesting focuses on a tax-savings threshold instead. If you were to set a \$1,000 loss threshold, then a position would only be sold if the sale resulted in a \$1,000 tax savings for the client.

When the trade engine spots tax loss harvesting opportunities that meet your criteria, you can instantly harvest those losses with a single click.



TAX LOSS HARVESTING ⓘ



Rebecca Birks · *****4396
Schwab · \$316,569

-\$30,432
EST. LOSS

TAX LOSS HARVESTING ⓘ



Carlos Garcia · *****1114
Fidelity · \$2,180,447

-\$419,687
EST. LOSS

TAX LOSS HARVESTING ⓘ



Kevin Takimono · *****2715
Pershing · \$1,458,172

-\$240,435
EST. LOSS

Managing the wash sale rule and switch back trades has never been easier.

Once you've harvested those losses for your client, Trading allows you to harvest to cash or alternative securities. And with replacement rules built right into Automated Tax Loss Harvesting, you can select alternative securities to buy into until the 31-day wash sale rule window has passed.

After 31 days, Trading will prompt you to switch the client back to their normal target allocation — no need for calendar reminders or post-it notes.

Armed with a host of other intelligent tax features and portfolio rebalancing tools in Trading, you can ensure you are avoiding unnecessary taxes that might reduce the tax alpha you just generated for your client.

LEARN MORE AT [NITROGENWEALTH.COM](https://nitrogenwealth.com)



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