



### **Introducing the Personalized Index**

Don't settle for one-size fits all funds. With Just Invest, Advisors can now construct transparent, index based personalized portfolios for each client. You specify the criteria, we manage the portfolios.



### **Leading ESG expertise at your fingertips**

Tap our thought leadership in ESG together with our big-data analytic platform to uniquely address client requests for ESG sensitive portfolios. Make your practice stand out by providing rigorously constructed portfolios that



### **Modern Tax Minimization**

Just Invest's sophisticated algorithms work throughout the year to minimize taxes and maximize the overall gain of client portfolios. Numerous studies have shown potential annual returns gains in excess of

**Now that's a Personalized Index!**

allow your clients to invest with intention.

1% from systematic tax loss harvesting.

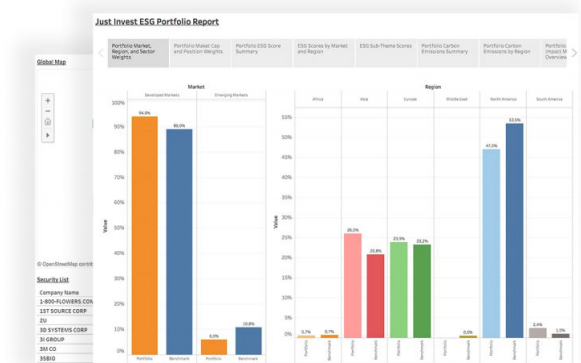
**Create positive impact and financial returns.**

**Do more for your clients with Just Invest.**

## Put technology to work for you and your clients

We believe each client deserves the best modern finance can deliver. Let Just Invest deliver personalized investment solutions that reflect the values and goals of each client in a transparent manner. We have built a portfolio management platform that puts you, the Advisor, in control while automating the ongoing portfolio management tasks. Gain unparalleled access to sophisticated index tracking, factor/smart-beta customizations, and ESG tailored portfolios that exactly fit the needs of your clients.

**Don't settle for less. Provide your clients with the most sophisticated personalization and reporting available.**



# FOR ADVISORS

## *Differentiate your business and engage your clients*

**Let Just Invest's automated portfolio management deliver better outcomes for clients while improving your overall business efficiency.**

LEARN MORE



### **Maximize after-tax returns**

Move past manual, opportunistic tax loss harvesting to a comprehensive and automatic solution for all your taxable accounts.



### **Drive client engagement**

Create deeper client engagement with Just Invest's personalized index solutions that directly address your clients' low basis positions, non-tradeable securities, or specific SRI/ESG requests.



### **Align client values**

Don't settle for one size fits all funds. Now you can offer clients investments that respect their religious values, work to reduce pollution, create sustainable communities and much more.



### **Deploy modern portfolio management**

We have built leading portfolio management solutions for the world's largest institutional investors. Now we deliver those same capabilities to you, delivering full transparency into your

client portfolios every  
step of the way.

## INDIVIDUALS & FAMILIES

You and your family are unique. You have distinct goals, needs and circumstances that deserve transparent, fairly priced and personalized investment solutions, all without sacrificing peace of mind.

Ask your advisor how Just Invest's Personalized Index solution can provide you with better:

- after-tax returns
- investment portfolios that account for both your financial objectives and personal values
- a level of portfolio control previously available to only the wealthiest investors.

## INVEST PROUDLY

**LEARN MORE**

**“Today, technology is synonymous with data. Advisors need to be better equipped with smarter data and analytics to compete in today’s marketplace and survive in tomorrow’s industry.”**

Steve Lockshin, FinTech thought leader

## READY TO TALK?

### CONTACT US



344 Thomas Berkley Way  
Oakland, CA 94612



Phone: 510-925-2025  
[info@justinvest.com](mailto:info@justinvest.com)

[Firm Brochure | ADV Part](#)  
[2](#)

©2018 Just Invest, Inc. All rights reserved. Just Invest LLC. is an Investment Advisor (RIA) registered with the State of California, State of Massachusetts, and State of Texas. Registration does not imply a certain level of skill or training nor does it imply endorsement by the State of California. This site is for informational purposes only and does not constitute an offer to sell, nor a solicitation of an offer to buy, any securities.

