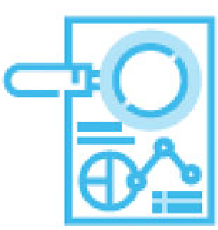
Schedule a Demo

See how our LifeYield Proposal Advantage Suite® can identify portfolio tax inefficiencies in seconds—Experience our intuitive, elegant interface firsthand.

Schedule a Demo



Read the White Paper

The Money Management Institute explores the industry's new paradigm—addressing all of a clients' investment needs at the household level–including taxes.

Download Modern Wealth (/main/LifeYield/media/ProductSheets/2019-MMI-Modern-Wealth-Roadmap-Paper-FINAL.pdf)

Buy Now

Start helping clients save on taxes and make the most of their retirement. Review your service plan options and start your monthly subscription today.

Buy Now (https://app.lifeyield.com/Advantage/Pricing)

It's time to revolutionize the way Americans save, invest, and draw income in retirement.

LifeYield is a core component of a new ecosystem of advisor technologies—a system that integrates every aspect of clients' financial lives to help achieve better retirement outcomes. The LifeYield Proposal Advantage Suite® coordinates assets held in various IRAs, 401(k)s, taxable accounts – and at different advisors – to enable truly tax-smart household-level portfolio management. Over time, it can add up to significant savings and higher retirement income.

02:17

An independent Ernst & Young study showed using LifeYield Proposal Advantage Suite® can boost after-tax returns and income by up to 33% over time.**

**Ernst & Young study

The LifeYield Proposal Advantage Suite®

Core Offerings

Taxficient SCORE®

Demonstrate the value of tax-smart household-level portfolio management by calculating a Taxficient Score—a measure of the tax-efficiency of your clients' accounts—created using Portfolio Advantage.

Quick Look (/main/Advisors/TaxficientScore)

Portfolio ADVANTAGE®

Look across all of a client's holdings and accounts and uncovers the tax-smart asset location that maximizes after-tax returns.

Quick Look (/main/Advisors/PortfolioAdvantage) Buy Now (https://app.lifeyield.com/Advantage/Pricing)

Targeted Solutions

Social Security ADVANTAGE®

Help clients find the optimum enrollment age and strategy to maximize their Social Security benefits.

Quick Look (/main/Advisors/SocialSecurityAdvantage) Buy Now (https://app.lifeyield.com/Advantage/Pricing)

Income ADVANTAGE®

Help clients maximize their after-tax income by identifying the best asset location and sequence of withdrawals to minimize taxes.

Quick Look (/main/Advisors/IncomeAdvantage) Buy Now (https://app.lifeyield.com/Advantage/Pricing)

See Enterprise Solutions

See how LifeYield provides your advisors with a clear competitive edge as they improve clients' financial health.

Enterprises (/main/Enterprises/ProposalAdvantage)

What Advisors Say

"

LifeYield helps us show our clients why we pay such close attention to taxes when structuring their portfolio. Clients are amazed how big of a difference it can make over the long run. Before LifeYield, it was much harder to estimate the potential tax savings and show those savings in an easy to understand way.

Steven Elwell, Chief Investment Officer and co-owner of Level Financial Advisors

"

Schedule a demo

Make sure your clients don't pay higher taxes than they should.

See how the Proposal Advantage Suite can significantly enhance your clients' after-tax investment returns.

Schedule a Demo

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