BlackRock

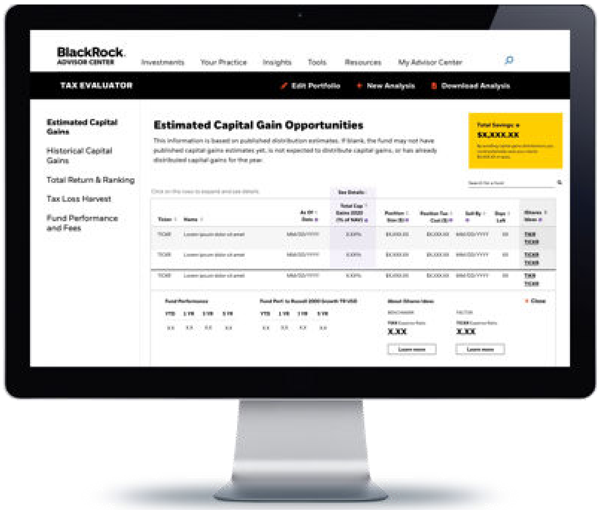
Anticipate potential tax impacts

Help get the most for your clients with Tax Evaluator

What does Tax Evaluator do?

See capital gains estimates and identify potential tax loss harvest opportunities across 7000+ funds.

The tool helps facilitate your strategic portfolio decision to help minimize tax impacts for your clients. Just upload your portfolio to see estimated capital gains distributions and fund performance information, as well as identify funds with negative price returns.



How do I use Tax Evaluator?

With your prospects

Differentiate your proposals by showing prospects how you can help them save money in taxes.

Upload their current portfolio and quickly compare and quantify the potential tax savings they might expect with your portfolio management approach.

With your clients

Identify potential tax-saving opportunities to help clients keep more of what they earn each year.

Reinforce your value by showing clients the potential dollar impact of your tax efficient investment strategy.

With the tools you already use

Tax Evaluator works where you work.

Access Tax Evaluator directly from the Envestnet platform. Look for the BlackRock Launch Pad to get started with Tax Evaluator and other Advisor Center tools.

It’s not what you make, it’s what you keep.

Tax drag lowers returns

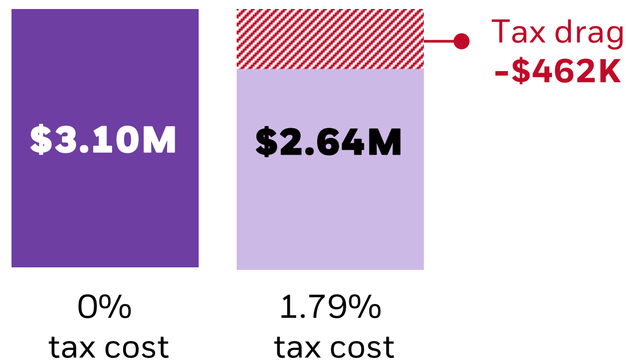
Taxes continue to affect portfolio returns over the long term. **Tax Evaluator** can help you analyze these costs and help you make better decisions for your clients.

Tax cost[1]

10 year average annual for US Large Cap mutual funds

1.79%

Hypothetical growth of $1,000,000 over 10 years at 12% return[2]



For illustrative purposes only.

1 Source: Morningstar as of Dec. 31, 2020. Tax Cost measures how much a fund's annualized return is reduced by the taxes investors pay on distributions (Difference between total annualized pre and post-tax returns over 10 years.) Data calculated using the oldest share class of all Active US large cap Equity Open-End Mutual Funds available in the U.S. 2 Source: BlackRock. The chart is for illustrative purposes only and is not indicative of the performance of any actual fund or investment portfolio. Does not include commissions or sales charges or fees. 12% represents the average pre-tax return over the same 10 year period for large cap equity mutual funds (12.30%). The hypothetical growth of $1,000,000 over ten years at a 12% return is $3,105,848. The hypothetical growth over ten years at a 12% return with a 1.79% tax cost is $2,643,687, resulting in a tax cost of $462,161. Historical tax costs are not indicative of future results.

Investing involves risk, including possible loss of principal.

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