

# NEWS

For Immediate Release

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## **Kwanti Announces Tax Portfolio Analysis and Advanced Model Tracking**

*In addition, portfolio analytics solution named finalist in ThinkAdvisor Luminaries and Wealth Management Industry Awards*

**SAN FRANCISCO, CA (August 22, 2023)** – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently announced two new enhancements to their platform, including Tax Drag Analysis, which allows advisors to identify hidden portfolio expenses and tax liability.

"Investing involves many hidden costs that reduce returns," said Christophe Gauthron, CFA®, Founder and CEO of Kwanti. "It's important for financial advisors to not only identify these costs in portfolios but also demonstrate and explain them in an understandable fashion to clients."

Tax drag can have a significant effect on overall performance, and tax-efficient investing techniques are important for recognizing capital gains, transferring wealth, and estate planning. Advisors that have the ability to show clients the impact of taxes between different investments can help them understand the importance of tax planning when investing. By reducing tax liability, the money saved stays invested and then compounds over time.

Kwanti's Tax Drag Analysis is designed to shed light on the 'hidden' expenses of portfolios and models in a clear and demonstrable manner. For Kwanti users, the existing portfolio expenses analysis has been invaluable in understanding how high expense ratios can affect and drag down portfolio returns. Now, with the new Tax Drag Analysis, advisors can efficiently showcase the significant impact of inefficient tax management on portfolio returns. 'Fund Expenses' and 'Tax Drag' now make up the improved 'Expenses' tab in Kwanti's intuitive, user-friendly interface.

Kwanti's Tax Drag Analysis is now available to both new and current users at no additional cost. To learn more about Tax Drag Analysis, [please click here to visit the Kwanti blog](#).

Kwanti offers a free 30-day trial, with no software to install and all features available during the trial. Financial advisors and other interested parties can [click here to sign up for the free trial](#) or [click here to watch a demo](#).

## **ADVANCED MODEL PORTFOLIO TRACKING**

Kwanti also recently introduced advanced Model Portfolio Tracking. Model Tracking is the ability to add a model portfolio's history of changes to achieve a more realistic illustration and performance calculation. For example, an advisor applied tactical changes to the model, and they want Kwanti's simulation to follow these changes. Previously, the only way to edit model history in Kwanti was through an import of CSV files. With this enhancement, users can edit the model history within the application, without the need for CSV imports.

Seeing a model portfolio's history of changes is very important when making proposals to prospects and clients. If tactical changes were applied to a model portfolio, or if the portfolio was rebalanced multiple times, the performance shown should reflect these changes. This ensures that the performance calculation aligns with the specific changes made, giving a more accurate representation of how the portfolio has performed over time.

Furthermore, having a comprehensive view of the portfolio's history and how it has navigated market fluctuations can help alleviate investor concerns. It provides a broader perspective on the portfolio's performance by going beyond what can be shown without the historical changes made to a model. This, in turn, can reassure investors to stay invested for the long run and help them avoid making impulsive decisions based on short-term market movements.

Kwanti's Model Tracking feature is now available to both new and current users at no additional cost. To learn more about Model Tracking, [please click here to visit the Kwanti blog](#). To see full documentation and a "how-to" video for using Model Tracking, [please click here for a full tutorial](#).

## **KWANTI NAMED FINALIST IN INDUSTRY LEADING AWARD PROGRAMS**

In addition, Kwanti was named a finalist in the financial services industry's two leading awards programs: the [2023 WealthManagement.com Industry Awards](#), an annual competition often referred to as the Wealthies, and the [2023 ThinkAdvisor Luminaries Awards](#).

In the 2023 Wealthies, Kwanti was named a finalist in the 'Model Marketplaces' category thanks to their robust [model marketplace](#) that offers model portfolios from some of the industry's top investment managers, including Fidelity, WisdomTree, BlackRock, State Street, and more. Kwanti's model marketplace gives advisors the ability to leverage the money management skills of some of the world's largest companies and take advantage of the robust institutional resources that go into developing third-party portfolios. Kwanti makes it easy to create custom models and implement blended strategies, which provide the ability to, for example, manage a fixed income and emerging markets focus within one portfolio. Advisors can design and manage as many model portfolios as they have clients, and updates can be as simple as dragging a slider to readjust weightings. Sharing models across team members is also easy: one member of an advisory team can create, edit, and manage all models while everyone else can be given access to each or just a few.

For the ninth year this September, WealthManagement.com will honor the best companies, individuals, and organizations that support financial advisor success at its annual Industry Awards. This year's winners across 92 categories, chosen by an independent panel of judges from more than 400 finalists, will be announced on September 7<sup>th</sup> at a black tie gala at the Ziegfeld Ballroom in New York City. The finalists were culled down from more than 1,000 entries from 413 companies.

To see the full list of finalists and to learn more about the 2023 WealthManagement.com Industry Awards, [please click here](#). To learn more about the 2023 Industry Awards gala and activities, [please click here](#).

In the 2023 ThinkAdvisor Luminaries Awards, Kwanti was named a finalist in the Financial & Investment Innovation category among Fintech/TAMP Platforms thanks to the consistent enhancements they make to their industry-leading portfolio analytics solution. The Luminaries shine a spotlight on individuals and firms that are taking the most creative and boldest steps to push the investment advisory industry forward, while having the biggest impact. The 2023 Luminaries program will culminate at the 3<sup>rd</sup> Annual ThinkAdvisor Luminaries Awards Dinner held in New York City on November 28<sup>th</sup>.

“We’re so excited to be named a finalist in both of these industry-leading awards programs,” said Gauthron. “This recognition reinforces all our hard work, as well as the enhancements we continually make to our platform in order to best serve advisors and their clients.”

To see the full list of finalists and to learn more about the 2023 ThinkAdvisor Luminaries, as well as the Awards Dinner, [please click here](#).

## **ABOUT KWANTI**

Founded by Christophe Gauthron, CFA® and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit [www.Kwanti.com](http://www.Kwanti.com).

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