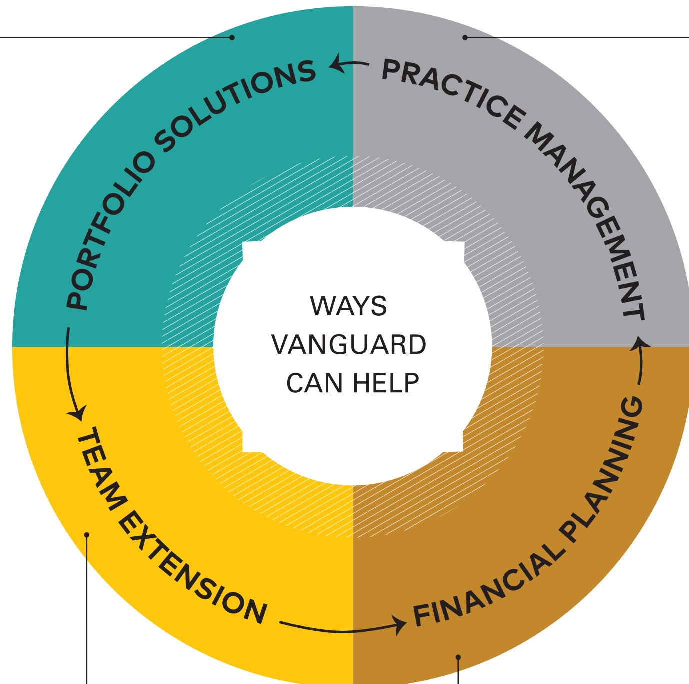
Vanguard

How can Vanguard help with your unique needs?



Portfolio solutions

- [ ] **Investment solutions**
  - Active and passive
  - Mutual fund, ETF
  - Vanguard Personalized Indexing
  - Equity, fixed income, ESG, cash management, factor investing
  - Model portfolios
- [ ] **Aligned thought leadership**
  - Economic and market outlook
  - Active Fixed Income Perspectives
  - Advisor digest
  - Webinars
  - Ad hoc calls with specialists
  - Capital markets and trading facilitation and best practices
- [ ] **Product due diligence**
  - Regular due diligence calls
  - Product data/literature
  - Review share classes for cost savings
  - Ad hoc requests
  - Access to senior portfolio specialist
  - Portfolio comparison tools
- [ ] **Portfolio due diligence**
  - Portfolio Analytics & Consulting Services
  - Portfolio construction tools
- [ ] **Benchmark due diligence**
  - How to avoid unintended overlaps and omissions in market coverage

Practice management

- [ ] **Evolution of service model**
  - Advisor's Alpha®—The value of advice
  - Intergenerational wealth resources
  - Navigating health care in retirement
- [ ] **Client conversation tools**
  - Client expectations builder
  - Onboarding discussion builder
  - Ongoing review builder
  - Value statement builder
  - Roth conversion calculator
- [ ] **Resources to support advisor/client engagement**
  - Client-approved literature
  - *Learn About* series
  - White label content
- [ ] **Business-building concepts**
- [ ] **Facilitation of best practice sharing**

Team extension

- [ ] **Connect your team with other Vanguard business partners**
  - 401(k) and institutional business
  - Personal investors

Financial planning

- [ ] **Continuing education credits**
- [ ] **Regular research on financial planning topics**
- [ ] **Tax center and playbook**
- [ ] **Advanced planning auxiliary tools**
  - Health care calculator
  - Break-even tax rate Roth conversion
  - Legacy planning resource (Intergenerational wealth tool)

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