



NEWS FROM THE MOTIVE PARTNERS NETWORK

55ip and InvestCloud to Expand Capabilities to Deliver Tax Optimization Solutions for Private and Public Assets in a Single Unified Managed Account

Private Markets Account™ (PMA) from InvestCloud, combined with 55ip's industry leading tax optimization engine, gives financial advisors a first-of-its kind solution to deliver tax-efficient strategies across both private and public assets within a Unified Managed Account

Boston, MA and Los Angeles, CA, December 2, 2025 – 55ip, a fully-owned subsidiary of J.P. Morgan, and a financial technology company purpose-built to break down barriers to financial progress, and InvestCloud, a global leader in wealth technology focused on delivering more meaningful outcomes for clients, today announced an expansion of their strategic partnership to deliver the first ever solution that enables tax optimization of both public and private market assets within a single unified managed account (UMA).

The Private Markets Account™ (PMA) from InvestCloud, introduced in December 2024 as a wealth management first, represents the next evolution in managed accounts, bringing public and private assets together in a unified account that automates workflows, trading, and reporting to drive greater efficiency and scale. By integrating 55ip's proprietary ActiveTax TechnologySM with PMA, financial advisors will be able to automate tax optimization, tax loss harvesting, and tax transition across diversified portfolios that include alternative assets. The result is the creation of a unified, tax-smart investment experience that expands access to private markets while improving after-tax outcomes for clients.

"Tax optimization has long been a key driver of client outcomes, but historically confined to public markets," said **Gautam Sachdev, CEO of 55ip**. "By integrating our tax-smart technology into the InvestCloud PMA, delivered in a unified managed account experience, we're giving advisors a new level of flexibility and efficiency, allowing them access to private markets while continuing to implement personalized, tax-advantaged strategies at scale."



Empowering the Registered Investment Advisor (RIA) firms already using 55ip's tax optimization tools, this expanded offering builds on a partnership that began in 2023 when 55ip's capabilities were first integrated into the InvestCloud managed account platform, APL, to further strengthen its tax optimization capabilities. By enabling personalized, tax-efficient strategies across both public and private assets, this breakthrough innovation expands access to investment vehicles that were once reserved for ultra-high-net-worth and institutional clients—unlocking new opportunities for more investors and giving advisors the flexibility to deliver differentiated strategies that drive real financial outcomes.

“Integrating 55ip's tax optimization engine into our Private Markets Account is a game-changer for financial advisors. For the first time, advisors can benefit from tax-efficient strategies across both public and private assets within a single UMA,” said **Cheryl Nash, President of APL at InvestCloud**. “I'm proud that we're leading the way in making private markets more accessible and impactful—not just through technology innovation, but by helping more people benefit from smarter, outcome-driven financial strategies.”

“The traditional lines separating public and private markets are blurring, presenting investors with powerful new opportunities,” said **Stephen Kaplan, J.P. Morgan Asset Management's Head of Customized Managed Accounts Solutions**. “As alternative investments become more accessible, we are in a new era of portfolio construction where converging public and private assets in a unified managed account, with tax optimization, is key to navigating volatility and targeting enhanced returns. This is an important milestone in our long history of actively managed solutions.”

Through this expanded collaboration, advisors will be able to:

- Implement tax-optimized portfolios that seamlessly combine public and private market assets within a single account
- Automate complex tax management – including tax optimization, tax loss harvesting, and tax transition – across diversified holdings
- Extend private market access to more clients while maintaining personalized, tax-efficient investment strategies
- Streamline portfolio management through unified digital tools that enhance transparency, efficiency, and scalability across advisory businesses

As investors increasingly seek access to alternative assets, this capability represents a major step forward in unifying wealth management across asset classes and tax strategies. This initiative underscores both companies' shared mission to deliver strategic innovations through collaborative partnerships that empower advisors, improve financial outcomes for clients, and expand access to private markets.



About 55ip

55ip is a financial technology company purpose-built to break down barriers to financial progress. Working to become the industry standard for automated, personalized, and optimized tax outcomes, the 55ip platform delivers efficient and tax-smart implementation to the financial services industry. Combined with leading trading and rebalancing capabilities, we offer a full-service solution that meets the unique needs of advisors. At the heart of 55ip's seamless, intuitive user experience is 55ip's ActiveTaxSM Technology, including elevated portfolio design and delivery, tax-smart transitions, management, and withdrawals, all helping advisors save time and pursue better outcomes for their clients. 55ip is a wholly owned subsidiary of J.P. Morgan Asset Management, the asset management business of JPMorgan Chase & Co. Visit 55-ip.com for more information.

About InvestCloud

InvestCloud, a global leader in wealth technology, aspires to enable a smarter financial future. Driving the digital transformation of the wealth management industry, the company serves a broad array of clients globally, including Wealth and Asset Managers, Wirehouses, Banks, RIAs, and Insurers. In terms of scale, the company's clients represent more than 40 percent of the \$132 trillion of total assets globally. As a leader in delivering personalization and scale across advisory programs, including unified managed accounts (UMA) and separately managed accounts (SMA), the company is committed to the success of its clients. By equipping and enabling advisers and their clients with connected technology, enhanced intelligence, and inspired experiences, InvestCloud delivers leading digital wealth management and financial planning solutions, complemented by a dynamic data warehouse, which scale across the complete wealth continuum. In 2024, InvestCloud introduced the first-of-its-kind Private Markets Account™ and Private Markets Account Network to enable integrated management of public and private markets assets from a single, unified managed account. Headquartered in the United States, InvestCloud serves clients around the world.

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