Tax Aware

Multi-Period After-Tax Reporting: A Practical Solution

October 31, 2018

After-tax performance reporting is critical for taxable investors but is unfortunately often overlooked due, in part, to its complexity and lack of offerings in the space. Instead, most performance reporting models available today provide only pre-tax reporting, ignoring the after-tax aspects so relevant for taxable investors. In this paper, we seek to resolve this issue by proposing an effective and workable after-tax performance report aimed at enhancing wealth preservation and accumulation for taxable investors. We also outline and offer justification for the various choices that we make in our report in the hope that others will adopt our proposed solution, but also review, comment, and improve on it.

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