YOUR TRUSTED INVESTMENT
OUTSOURCE PARTNER

MAINSTREET ADVISORS

DI

Partner with us to Deliver Scalable, Personalized, and Tax-Efficient Portfolios

AI-Enhanced Capabilities



TAX LOSS HARVESTING

Optimize tax outcomes with precision-engineered strategies.



AUTO RE-BALANCING

Keep portfolios aligned with client goals through fully automated adjustments.



TAX-EFFICIENT PORTFOLIO TRANSITION SERVICES

Seamlessly transition portfolios without disruption to end clients.



SMART WEIGHTS ALLOCATIONS

Deliver performance-focused portfolios tailored to specific client objectives.

MSA Personalized Indexing is a separately managed account that may be a core strategy complemented by other complementary asset classes.

WHICH ACCOUNTS ARE RIGHT FOR MSA PERSONALIZED INDEXING?

-Concentrated Portfolios
-Higher Tax Bracket Investors
-Investors Interested in Aligning their Investments with Personal Values
-Investors Sensitive to Performance Dispersion from an Index
-Philanthropic Investors
-Investors Seeking Medium to Long Term Growth

WHAT IS THE MINIMUM ACCOUNT SIZE?

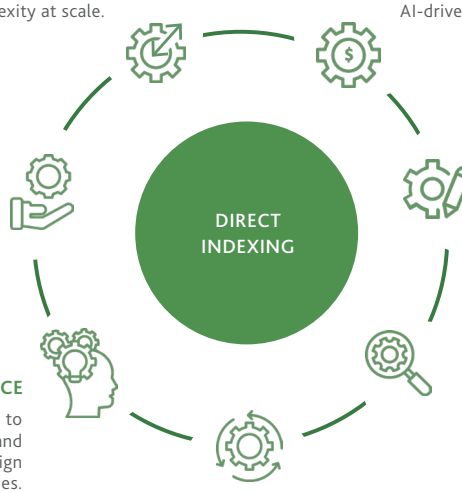
$500,000

Empowering advisors and institutions personalized solutions:

- CHOOSE 1,000+ DIRECT INDEXES
- 50+ CUSTOMIZATIONS INCLUDING ESG
- FULLY AUTOMATED, AI-ENHANCED
- DIRECT CUSTODIAN INTEGRATION
- PERSONALIZATION WITH PERFORMANCE
- TAX-EFFICIENT TRANSITIONS

MAINSTREET ADVISORS

Gain valuable time to deepen client relationships, enhance client satisfaction, and focus on activities that drive revenue growth.



SCALABILITY

Seamlessly manage client portfolios with advanced technology designed to handle complexity at scale.

COST-EFFICIENCY

Reduce operational overhead with streamlined processes and AI-driven automation

DEDICATED SUPPORT

We help firms like yours thrive with tailored research, portfolio solutions, and engaging client-facing content.

CUSTOMIZATION AT SCALE

Offer tailored investment solutions—from ESG alignment to tax-efficient transitions.

INDUSTRY EXPERIENCE

Rely on our experienced team to deliver compliant, innovative, and reliable portfolio solutions that align with institutional priorities.

FOCUS ON CORE COMPETENCIES

Let us handle the complexities of portfolio management, enabling your team to excel at client service and strategic growth.

INTEGRATED TECHNOLOGY

Simplify your operations with direct accounting system/custodian integration and an API-first design that works seamlessly with your existing infrastructure.

Ready to grow your business?

Contact us today to discover how to add MSA Personalized Indexing to your Investment Toolbox.

Scan to learn more

Give your clients a custom-curated investing experience. | 312.223.02770 | info@mainstreetadv.com

MainStreet Advisors | 120 North LaSalle Street | Suite 3300 | Chicago Illinois | mainstreetadv.com

MainStreet Investment Advisors, LLC ("MainStreet") is a federally registered investment adviser under the Investment Advisers Act of 1940. Registration as an investment adviser does not constitute an endorsement of MainStreet by the SEC nor does it indicate that MainStreet has attained a particular level of skill or ability.