WOODWARD CAIRE ADVISORS

FOR CPA PARTNERS · HOUSTON

No more March surprises. No cost to you.

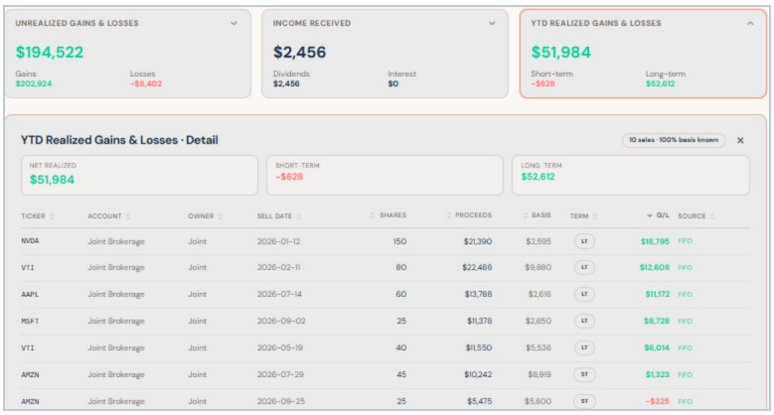
We manage your clients' investments and coordinate with you all year through Meridien, our client platform. You get a read-only login. Everything in one place. Coordinated together at no extra cost to you. Partnership as it should be.

WHAT YOUR LOGIN SHOWS

Realized gains + losses.
No surprise 1099-B in March.

Unrealized gains + losses.
By lot. Harvest before year-end.

Interest + dividend income.
Estimates built on actual dollars.



Meridien tax view: realized and unrealized gains by lot.

THE QUESTIONS YOUR CLIENTS ASK YOU. ANSWERED TOGETHER.

Best fit: $2M to $20M

You know the whole return. We know the portfolio. Your client gets both in one plan.

"Why do I owe so much this year?"	We show the client where the gains came from, and plan ahead together so it doesn't repeat.
"How do I lower my taxes next year?"	We show the client harvesting opportunities and coordinate any minimization strategies you suggest.
"Is my advisor doing a good job?"	You have their trust. We show you ours: fees, risks, allocation, and tax drag. All part of the Meridien platform. Available to you both. 24/7.
"What do I do with the money from the sale?"	We meet with you before closing and plan the investments and tax bill together.
"Can I afford to retire?"	We work together to plan for retirement and other goals, and coordinate the tax consequences of any actions.

We stay in our lane.
No tax prep, just wealth advisory.

Fee-only fiduciary.
No commissions, insurance, or annuities.

Read-only access.
No money movement from Meridien.

Career portfolio managers.
Thirty years experience. Matt Caire, CFA, CFP®, CMT, taught the CFA and CFP programs at Rice.

Start with a Portfolio Tax Review.

Send us one client. In thirty minutes we review their fees, risk and tax exposure, free, and share the findings with you both.

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See Meridien