

## A New Strategy for an Old Problem: Tax Drag

Imagine planting a tree. Every year, as it grows, someone comes by and clips off a third of the new branches. Not because they're dead or overgrown-but simply because *that's the rule*. Now imagine if you could grow that tree without the annual pruning, letting every new branch fuel even more growth.

That's the difference between traditional fixed income investing and the Compoundr strategy.

## The Problem: Taxes on Income Eat Into Your Growth

Most fixed income ETFs deliver their returns as income-interest that's taxed every single year at your marginal tax rate. Whether you're an individual investor, advisor, or family office, that annual tax bite acts like gravity on your compounding potential.

Even worse? You don't control when you pay it. The tax man decides.

## The Solution: Compoundr Rewrites the Rules

The Compoundr strategy takes those recurring income payments and transforms them into deferred capital gains. Instead of handing over a chunk of your return every year, you defer the tax and let the entire amount keep working for you.

And when you do eventually realize gains, they're taxed at lower long-term capital gains rates-not at your marginal income rate.

Let's break down what that means:

- More to reinvest today**
- Lower taxes in the future**
- Control over when you trigger a taxable event**

### Why It Works

Compoundr is built for asset classes-like fixed income-where a large portion of the return comes from interest. It uses a proprietary strategy that shifts the nature of income, allowing investors to benefit from tax deferral, improved compounding, and better after-tax performance.

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## We Fixed Income™

At Compoundr, we're not just offering a strategy. We're offering a shift in how you think about taxable investing. A move from playing defense with your taxes to playing offense with your compounding.

It's time to stop giving up growth to taxes you don't have to pay.

It's time to Compoundr.