



**55ip INVESTMENT PLATFORM LAUNCHES
WITH VINE STREET PARTNERS AND UNITED ADVISORS AMONGST ITS FIRST CLIENT
PARTNERSHIPS**

**55ip's Platform Enables Growth-Minded Investment Advisors the Ability to Deliver Custom,
Brandable, Tax Managed Strategies to Their Clients**

New York, November 7, 2017—[55ip, LLC](#) (formerly known as 55 Institutional Partners, LLC), a leading investment science and technology firm, announces the launch of the **55ip Investment Platform**, which includes the company's proprietary Strategy Builder and Tax Optimization tools. These are the first in a suite of technology solutions from 55ip, created to enable independent registered investment advisors (RIAs) and wealth managers to easily design personalized ETF portfolios and deliver better outcomes for clients. Among the first clients to use and adopt the 55ip platform are United Advisors, an advisor and wealth management support platform, and Vine Street Wealth Management LLC, the technology-savvy investment advisory firm based in Mill Valley, CA

The 55ip platform was designed and built by 55ip's top team of investment scientists, award-winning academic researchers and seasoned industry professionals.

- The 55ip platform allows an advisor to **design new investment strategies** or **enhance existing strategies** through **lower risk, taxes and fees**.
- The 55ip platform allows advisors the ability to customize strategies with their own **brand** and desired features.
- The 55ip platform allows advisors to offer its own clients greater **transparency** in how their portfolios are designed and managed.
- The 55ip tax technology **makes tax optimization more accessible**, easier to implement, and more effective than traditional methods to deliver better after-tax returns for investors.

"There's a new breed of registered investment advisor out there: they're entrepreneurial, purpose-driven and understand that custom risk, tax and fee sensitive investment solutions can help their clients achieve their goals," said Paul Gamble, CEO of 55ip. "We've built a robust tech-enabled platform, informed by the best investment science available to help advisors provide personalized investment strategies for their clients in a consumable, scalable way. Our platform can be customized with an advisor's own brand, can help them differentiate their value, and can scale their business."

"In addition to our 'design, analyze and execute' interface, users of the 55ip platform also have access to the firm's brain trust of research partners, award-winning academic thinkers and macro advisors: some of the best minds in the financial world," said 55ip Founder and Chairman Dr. Vinay Nair. "We've focused on empowering advisors with scientific and algorithmic features that

can be used in isolation or mixed as desired to create personalized portfolios that enable clients to keep more of their money thanks to reduced fees, taxes and risk.”

“We launched Vine Street because we felt that there is an opportunity to disrupt the wealth management industry with more transparent and customizable approaches than are currently available.” said Sasha Kovriga, Vine Street Wealth Management Partner. “55ip allows us to efficiently create tax optimized and risk averse portfolios for our clients. We’re particularly impressed with the transparency, flexibility and precision that 55ip affords us in designing truly customized solutions.”

“A year ago, we began offering a range of 55ip’s ETF portfolio strategies to our registered investment advisor clients, and the feedback was extremely positive,” said Mark Penske, Chairman and CEO, United Advisors. “Because our success relies on our clients, we’re always seeking ways to give them the best tools possible. We are delighted that we can now offer them 55ip’s open, brandable, scalable and sophisticated platform and tools.”

For an animation overview of the 55ip platform, including Strategy Builder and Tax Optimization tools, visit <https://vimeo.com/236460505>.

About 55ip, LLC

55ip LLC is a leading investment science and technology firm based in New York City and Boston and founded in 2016. Its team of prominent academic researchers, investment experts and financial technology professionals have developed proprietary technology and methodologies that enable asset managers, advisors and wealth managers the ability to deliver better outcomes for clients. 55ip’s services include helping partner firms design investment strategies, educate clients, and streamline management of portfolios of ETFs and other passive building blocks. The firm’s tax technology makes tax optimization more accessible, easier to implement and more effective than traditional methods to deliver better after-tax returns for investors. More information is available at <https://55institutional.com/>.

About Vine Street Partners

Vine Street Wealth Management is a full-service wealth management firm based in the San Francisco Bay Area. We focus on providing custom investment solutions and comprehensive advice to individuals, families and institutional clients.

About United Advisors

United Advisors is an advisor and wealth management support platform focused on helping our affiliates and partners progress toward their personal and professional goals. Centralizing many of the back and middle office functions, we help streamline the needs of growing advisory firms, allowing advisors to focus on business development, succession planning and acquisitions. UA provides different affiliation models allowing flexibility as to how advisors run their businesses at specific transition points in their business life cycle.