



## **Income Research + Management and BondBloxx Partner to Launch Tax-Aware ETF**

*New BondBloxx IR+M ETF designed for investors seeking income and tax-efficient bond strategies*

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BOSTON & LARKSPUR, Calif.--(BUSINESS WIRE)--Income Research + Management (“Income Research” or “IR+M”) and BondBloxx Investment Management (“BondBloxx”) today announced a new partnership. BondBloxx filed a registration statement for the BondBloxx IR+M Tax-Aware Short Duration ETF, which IR+M will sub-advise.

IR+M is a privately-owned, independent, fixed income investment management firm with over three decades of experience in active portfolio management. BondBloxx, a rapidly growing ETF issuer, specializes in offering a comprehensive range of fixed income ETFs. Through this partnership, clients will gain access to IR+M investment capabilities in a co-branded fixed income ETF wrapper.

“The partnership with BondBloxx represents our first-ever IR+M branded fixed income ETF,” said Erinn King, CFA, Chief Strategy Officer at IR+M. “We’re excited to broaden access to IR+M’s strategies by making them available to all investors. Our respective firms offer complementary expertise and client focus, making BondBloxx a natural strategic partner of choice for IR+M.”

As detailed in the filing, the BondBloxx IR+M Tax-Aware Short Duration ETF (the “Fund”) will seek attractive after-tax income, consistent with preservation of capital and prudent investment management. The Fund will seek to invest in a diversified portfolio of both municipal and taxable short duration fixed income securities; under normal circumstances, at least 50% of the Fund’s assets will be held in municipal securities that pay interest that is exempt from federal income tax.

“Municipal bonds are an important tool for taxable clients. However, investors may overlook other opportunities,” added BondBloxx Co-Founder Tony Kelly. “By adopting a wider perspective on portfolio construction, we can create a more comprehensive approach that seeks to maximize after-tax return. The collaboration between BondBloxx and IR+M brings together experienced teams to develop fixed income solutions for clients.”

## About Income Research + Management (IR+M)

IR+M is a privately-owned, independent, fixed income investment management firm that serves institutional and private clients. The firm manages \$92 billion across the duration spectrum and provides custom solutions tailored to client needs. IR+M's investment philosophy and process are based on the belief that careful security selection and active risk management provide superior results over the long-term. By combining the capacity and technology of a larger firm with the culture and nimbleness of a boutique firm, IR+M strives to provide exceptional service for clients. Visit: [www.incomeresearch.com](http://www.incomeresearch.com).

## About BondBloxx

BondBloxx Investment Management Corporation ("BondBloxx") is the first ETF issuer to focus solely on fixed income, offering a range of exposures spanning U.S. Treasuries, high yield bonds, and emerging markets bonds. To learn more about BondBloxx's fixed income-first mission, visit [BondBloxxETF.com](http://BondBloxxETF.com). BondBloxx is a registered investment adviser and only transacts business in states where it is properly registered or is excluded or exempted from registration requirements.

**Carefully consider the Funds' investment objectives, risks, charges, and expenses before investing. This and other information can be found in the Funds' prospectus or, if available, the summary prospectus, which may be obtained by visiting [bondbloxxetf.com](http://bondbloxxetf.com). Read the prospectus carefully before investing.**

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