

Coach's Corner

Latest commentary from David Richman and Dave Gordon to help you elevate the success of your practice

Disclosure

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.

Almost as good

By: David Richman | December 15, 2020

A few weeks ago, we were in a socially distant visit with one of our sons, his wife and their three children. We were outside on their deck admiring our newest addition to the family, celebrating our granddaughter's one-month birthday.

This moment led me to reminisce about her gender reveal party. This dance down memory lane included a vivid mental picture of my wife, our other children with their families, my daughter-in-law's family and me present on the same deck. Only one major error.

My wife, son, daughter-in-law and even our eldest grandson, a wise 5 1/2-year-old, all banded together in unison to correct me: "You weren't here. It was a Zoom party!" It took me several minutes to realize they were correct.

Thanks for sticking with this story. Those of you who know me are likely familiar with my practice of only sharing stories that serve a purpose. What is my purpose? The underlying thought is for you to reflect on what you are doing to make your virtual get-togethers special. My thesis? The more special the experience, the more likely the faded memory will be almost as good as if you were actually elbow to elbow and eye to eye.

The reveal party included a cake to be cut into with the surprise pink icing. The excitement of sharing the moment made it somehow turn into such a special memory despite Zoom fatigue. Imagine what it might have felt like if a cake was delivered to each of us so we could have done the "reveal" together in harmony.

Bottom line: Keep thinking outside the box. Maybe it is as simple as sending clients their favorite coffee to be enjoyed together during your virtual year-end morning meetings. Maybe it can be almost as good as being there.

Related Content

[RELATED POST: Do you remember?](#)



David Richman
National Director
Eaton Vance Advisor
Institute

"The underlying thought is for you to reflect on what you are doing to make your virtual get-togethers special."

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). Read the prospectus carefully before you invest or send money. For closed-end funds, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). Before purchasing any variable product, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved. Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#)