The Advisor Institute

Strategies and insights to help advisors grow their skill sets, teams and practices

Chasing Positivity®
The Charismatic Advisor® in Conversation

Learn to apply the ***3 Dynamics*** to your conversations

- Communicate empathically
- Collaborate consciously
- Inspire action

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FEATURED EVENT

Nurturing Client Resilience

How do you nurture client resilience as COVID-19 continues to impact the economy and the markets? Listen now for new insights for your client conversations.

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Insights to Support Practice Management

The After-Tax Advisor®
Help clients think ahead to improve their tax experience

Responsible Investing
Explore the growth opportunity in helping clients align their values and portfolios

Attracting Clients
Activate a growth mindset to expand your business

Bridge to Referrals
Build a bridge to referrals with more purposeful messaging

Working With the Wealthy
Differentiate your capabilities in conversations with high-net-worth clients

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Commentary to help you elevate the success of your practice

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David Richman

National Director of Eaton Vance Advisor Institute

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David M. Gordon, CFA, CPWA

Director of Eaton Vance Advisor Institute

"We work to sharpen advisors' edge by helping them refine their investment approaches."

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