

[< Back to The Advisor Institute](#)

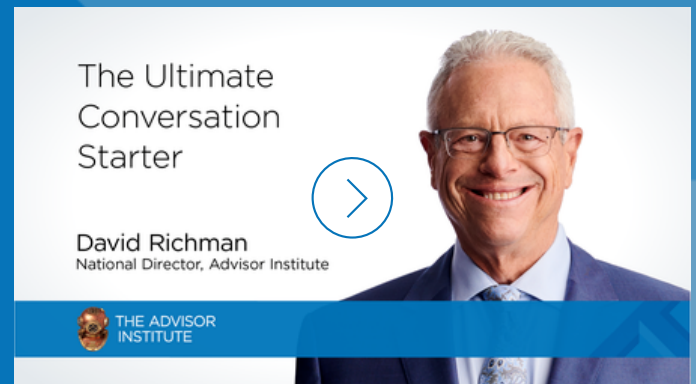
Attracting Clients

Activate a growth mindset to expand your business

FEATURED VIDEO

The Ultimate Conversation Starter

Not sure how to approach the topic of estate planning with your clients and prospective clients? Try this simple but effective technique. (2:14)





Insights

Thought leadership to help you grow your business

A Lifetime of Saturdays

Approaches to the "soft side" of a retirement conversation

[DOWNLOAD](#) 

Better First Meetings

Run more purposeful, coordinated and conclusive first meetings

[DOWNLOAD](#) 



Coach's Corner Blog

Commentary to help you elevate the success of your practice

LATEST ATTRACTING CLIENTS BLOG POSTS

[Attracting Clients](#) | [Chasing Positivity](#)
[Go Beyond the Fee Conversation](#)

By: [David Richman](#) | November 29, 2022

[READ MORE](#)

[Attracting Clients](#) | [Chasing Positivity](#) | [Inflation](#)
[Engage Clients Based on Their Coping Strategies](#)

By: [David Richman](#) | November 15, 2022

[READ MORE](#)

[READ ALL ATTRACTING CLIENTS POSTS](#)

Friends of the Institute

Financial advisors, subscribe and receive monthly email insights.



[SUBSCRIBE](#)



HEADQUARTERS

Two International Place
Boston, MA 02110

Investments

- [Eaton Vance Funds](#)
- [Parametric Funds](#)
- [Calvert Funds](#)
- [Separately Managed Accounts](#)
- [Closed-End Funds and Term Trusts](#)

Insights

- [Advisory Blog](#)
- [Monthly Market Monitor](#)
- [Market Update Events !\[\]\(8d139a66f540002704b5c70b7fe6cc7a_img.jpg\)](#)
- [The Advisor Institute](#)

Taxes & Tools

- [Investment Tax Center](#)
- [Tax Information](#)
- [Investment Tax Calculator](#)
- [Laddered Investing Interest Rate Scenario Tool](#)
- [Concentrated Stock Position Calculator](#)
- [Tax-Equivalent Yield Calculator](#)

Resources

- [Forms & E-Delivery](#)
- [Mutual Funds & Abandoned Property](#)
- [DST Vision](#)
- [AdvisorCentral](#)

Accessibility	Business Continuity	Privacy & Security	Terms & Conditions	Careers	Contact	Investor Account Access
-------------------------------	-------------------------------------	--	--	-------------------------	-------------------------	---

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.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 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](#)

Publication details: Thursday, November 10, 2022 10:15 AM

Page ID: 40524 - <https://funds.eatonvance.com/attracting-clients.php>