



Eaton Vance Advisor Institute

# Chasing Positivity<sup>®</sup>

The Charismatic Advisor<sup>®</sup> in Conversation

## Chase Positivity to Inspire Action

Based on the principles of positive psychology, the **3 Dynamics** will help you have more meaningful conversations with clients that inspire them to act in their best interests.

## Explore the **3 Dynamics**

Leverage these resources to improve your conversations with clients and prospects.



### Getting started



**LISTEN** | An approach to learning the **3 Dynamics**

6 minutes



**WATCH** | Why the **3 Dynamics** matter

5 minutes



**LEARN** | A road map to master the **3 Dynamics**

5 minutes



**LEARN** | Prepare for success

3 minutes





## Communicating empathically



**LISTEN** | [Practice leaving yourself behind](#)

[8 minutes](#)



**LEARN** | [Lead with genuine interest](#)

[5 minutes](#)



**LEARN** | [Three strategies to understand purpose](#)

[5 minutes](#)



**PLAN** | [Become more empathic](#)

[15 minutes](#)



## Collaborating consciously



**LISTEN** | [Put away the black robe](#)

[5 minutes](#)



**LISTEN** | [Beware of painting with a broad brush](#)

[5 minutes](#)



**LISTEN** | [Don't take the bait](#)

[5 minutes](#)



**WATCH** | [Why intentionality matters](#)

[6 minutes](#)



**LEARN** | [Engage clients based on their coping style](#)

[5 minutes](#)



**PLAN** | [Become a better collaborator](#)

[15 minutes](#)



## Inspiring action



**LISTEN** | [A proven approach to increase engagement](#)

[10 minutes](#)



**LISTEN** | [Align by deploying the joining technique](#)

[11 minutes](#)





**LEARN** | [Words and phrases to inspire action](#)

[5 minutes](#)



**PLAN** | [Inspire action in others](#)

[15 minutes](#)



## Explore more from Eaton Vance Advisor Institute

- Visit the Coach's Corner Blog
- Call (800) 836-2414 to request a complimentary copy of Chasing Positivity®

[SUBSCRIBE TO MONTHLY INSIGHTS](#)

[VISIT THE ADVISOR INSTITUTE](#)



### HEADQUARTERS

One Post Office Square  
Boston, MA 02110

### [Investments](#)

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed  
Accounts](#)

[Closed-End Funds and  
Term Trusts](#)

### [Insights](#)

[Advisory Blog](#)

[The BEAT](#)

[Market Update  
EventsContent for  
Investment Professionals  
only](#)

[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](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#)  | [Terms & Conditions](#) | [Careers](#) | [Contact](#) | [Investor Account Access](#) | [Morgan Stanley Investment Management Terms of Use](#)

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, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**, the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). 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](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, 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. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:49 AM

Page ID: 39527 - <https://www.eatonvance.com/chasing-positivity.php>