

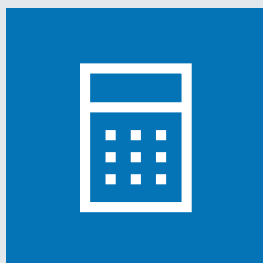


TAX FORWARD ■ 365®

Diversifying Concentrated Stock Positions

Many business owners, corporate executives and other investors have accumulated significant wealth by owning large concentrations of a single stock – wealth that needs strategic diversification.

How we can help

[TOOLS & CALCULATORS](#)[SPOTLIGHT STRATEGIES](#)[ACTIONABLE INSIGHTS](#)[ADVISOR RESOURCES](#)

TOOLS & CALCULATORS

Show clients how diversifying their concentrated stock positions on a tax-deferred basis may be a better option than a taxable sale.

[CONCENTRATED STOCK POSITION CALCULATOR](#)[ACCESS MORE TAX FORWARD TOOLS](#)

SPOTLIGHT STRATEGIES

Choose what best fits your clients' personal diversification needs, financial objectives and/or philanthropic goals.

Parametric Custom Core®

Separately managed accounts that offer active tax management, a rules-based approach and a range of customization alternatives - at a cost that compares favorably with most ETFs and mutual funds.

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U.S. Legacy Income Trusts®

Next-gen planned giving instruments that offer tax-advantaged income for life and a legacy of charitable giving, established by the U.S. Charitable Gift Trust®.

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ACTIONABLE INSIGHTS

Focus and reinforce your client conversations with practical, relevant commentary.

Advisor Institute, Coach's Corner blog: The concentration conversation

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Advisor Institute, Coach's Corner blog: What's Below the Waterline?

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ADVISOR RESOURCES

Dive deeper into our spotlight strategies and stay on top of market trends with resources from Eaton Vance and the U.S. Charitable Gift Trust®

Concentrated stock positions: Know the risks

[VIEW FLYER](#) ▶

Unlocking appreciated company stock through tax-loss harvesting

[VIEW CASE STUDY](#) Content for Investment Professionals only ▶

Diversifying concentrated stock positions with U.S. Legacy Income Trusts - CA resident

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