



# Customized Investing Center

## A personalized approach

Create customized solutions that reflect your clients' values and investment preferences.

## Next-level investing

Address a variety of client needs with highly customizable solutions.

Reflect personal values through responsible investing strategies

Access interactive tax tools that engage and educate

Reduce exposure to concentrated stock



Incorporate industry, sector or security exclusions

Tailor portfolios for credit quality, maturity and state preference

Build customized benchmark indexes

# Broad investment choice to satisfy dynamic investor goals



Fundamental active managers of equity, income, alternative and multi-asset strategies



Customized, client-driven passive SMA portfolios that employ a transparent rules-based approach



A global leader in responsible investing focusing on proprietary research and active engagement

## Explore separately managed accounts

Separately managed accounts (SMAs) offer flexibility, personalization and tax efficiency that go beyond what can be achieved through mutual funds and ETFs.

### The leader in SMA investing

Together with our highly specialized brands, Eaton Vance is one of the largest SMA managers in the US.\*

### Broad selection of strategies

Customizable equity, fixed-income, ESG-focused, and alternative strategies.

[LEARN MORE](#)

# Active, year-round tax management

Access strategies designed to help minimize tax liability and enhance after-tax return potential.

[TAX-EXEMPT INVESTING](#)

[TAX MANAGEMENT STRATEGIES](#)



## Explore more Eaton Vance investing strategies

### Tax Management Center

Help investors keep more of what they earn

[VISIT TAX MANAGEMENT CENTER](#)

### Responsible Investing Center

Diverse approaches for ESG-focused investors.

[VISIT RESPONSIBLE INVESTING CENTER](#)

Questions about where to start with customized investing?

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\*Source: Money Management Institute & Cerulli Associates: Advisory Solutions Quarterly. Based on AUM among Separate Account Consultant Program Asset Management Groups, as of Q4 2021.

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