



Tax Forward 365® Monthly Planner

Timely actions and resources for adding year-round value

SEPTEMBER
2022

OCTOBER
2022

NOVEMBER
2022



Engage
current
clients

Action step

- ▶ Discuss any portfolio adjustments clients should consider that would reflect potential tax policy changes at the local, state and national levels.



Attract
new
clients

Action step

- ▶ Offer to review prospective clients' bond portfolios. Discuss the potential tax, income and diversification benefits of a laddered municipal bond strategy.

Helpful resources

- ▶ [BLOG: 'Location, Location, Location'](#)
- ▶ [TOOL: Eaton Vance Parametric Investment Tax Calculator](#)

Helpful resources

- ▶ [BLOG: 'All Politics Is Local'](#)
- ▶ [FLYER: A municipal bond fund powerhouse](#)

Key dates*

OCTOBER 17:

- ▶ Final extended deadline to file individual and corporate tax returns for the year 2021 (Form 1040 and Form 1120)

*Source for all non-Eaton Vance event dates: Internal Revenue Service

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Two International Place
Boston, MA 02110

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Publication details: Monday, October 3, 2022 5:52 AM

Page ID: 41902 - <https://funds.eatonvance.com/digital-tax-planner.php>