High-Net-Worth Investing Center

When traditional strategies are not enough

With affluence comes unique demands, and Eaton Vance has customizable strategies to help meet the demands of your most discerning clients.

Look to Eaton Vance for solutions to your clients' most significant investment challenges.

Customization

One-of-a-kind portfolios designed to help HNW clients pursue their financial and philanthropic goals

Tax management

Strategies to help maximize after-tax wealth

Specialized strategies

Strategies designed to minimize taxes, manage volatility, enhance total return or generate income

Innovative solutions for HNW investors

Eaton Vance and its brands offer a range of investing and charitable giving solutions.

Unique High-Net-Worth (HNW) Solutions*

HNW Capabilities	HNW Priorities					
	Concentrated Stock	Volatility Management	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing
Parametric Custom Core® ⓘ Custom, tax-managed equity portfolios	●		●		●	●
Parametric Option Overlay Strategies ⓘ Seek to enhance returns on existing assets	●	●		●		
Parametric TABS Managed Municipals ⓘ Pursue tax-exempt income and capital preservation			●	●		●
Parametric TABS Municipal Ladders ⓘ Seek to minimize interest-rate risk and provide tax-exempt income			●	●		●
Parametric Corporate Ladders ⓘ Pursue income and capital preservation			●	●		●
Calvert Research and Management ⓘ Research-based Responsible Investing				●	●	●

Charitable giving solutions with the U.S. Charitable Gift Trust®

HNW Capabilities	HNW Priorities					
	Appreciated / Concentrated Stock	Volatility Reduction	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing
U.S. Legacy Income Trusts® ⓘ Tax-advantaged income for life | Legacy of charitable giving	●		●	●	●	
Donor-Advised Funds ⓘ Immediate tax deduction. Flexible giving options.	●		●		●	●

Tools for high-net-worth planning

Take your clients to the next level with our suite of online calculators.

Investment Tax Calculator

LAUNCH TOOL

Charitable Income Tax Deduction Calculator

LAUNCH TOOL

Concentrated Stock Position Calculator

LAUNCH TOOL

Laddered Investing Interest Rate Scenario Tool

LAUNCH TOOL

Let's talk about your HNW clients' objectives and needs.

CONTACT US

INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industryleading customization and tax management solutions.

HIGH-CONVICTION EQUITIES | ACTIVE FIXED INCOME AND LIQUIDITY | ALTERNATIVE INVESTMENTS | CUSTOMIZED SOLUTIONS | SUSTAINABLE INVESTING | TAX SOLUTIONS

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Customized Investing Center

Flexible solutions from the leader in SMA investing

VISIT CUSTOMIZED INVESTING CENTER

Tax Management Center

Help investors keep more of what they earn

VISIT TAX MANAGEMENT CENTER

Advisory services offered by Eaton Vance Management, Parametric Portfolio Associates LLC and Calvert Research and Management, SEC-registered investment advisers and affiliates of Eaton Vance.

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