Wealth Strategies Overview

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

Customized portfolios

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

Explore our content centers for in-depth information on the topics that matter most to HNW investors.

Customized Investing Center

Eaton Vance offers a wide range of customizable SMAs across a range of traditional equity, fixed income, ESG-focused, and alternative strategies

Tax Management Center

Helping investors maximize after-tax returns

Responsible Investing Center

Diverse approaches for socially minded investors

Concentrated Stock Center

Portfolio strategies for reducing risk

High-Net-Worth Investing Center

Customizable planning for the unique demands that affluence brings

We understand objectives for high-net-worth investors

> “It takes thoughtful dialogue, customized solutions and specialized tools to help high-net-worth clients pursue their financial and philanthropic objectives.”
>
> John Moninger, SVP, Managing Director Retail, Eaton Vance

- ✓ Tax Efficiency
- ✓ In-kind funding*
- ✓ Appreciated/concentrated stock
- ✓ Diversification
- ✓ Steady income
- ✓ Long-term growth
- ✓ Responsible investing

*In-kind funding refers to using assets or securities to fund a strategy instead of cash.

INVESTMENT CAPABILITIES

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

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

Questions about how Eaton Vance can assist with wealth strategies?

CONTACT US

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*Before investing in any Eaton Vance fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or download a copy **here**. Read the prospectus carefully before you invest or send money. 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**. 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.*

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