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

- ✓ 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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Investments

- Eaton Vance Funds
- Parametric Funds
- Calvert Funds
- Separately Managed Accounts
- Closed-End Funds and Term Trusts

Insights

- Advisory Blog
- The BEAT
- Market Update
- EventsContent for Investment Professionals only
- The Advisor Institute

Taxes & Tools

- Investment Tax Center
- Tax Information
- Investment Tax Calculator
- Laddered Investing Interest Rate Scenario Tool
- Concentrated Stock Position Calculator
- Tax-Equivalent Yield Calculator

Resources

- Forms & E-Delivery
- Mutual Funds & Abandoned Property
- DST Vision
- Active Advisor
- Corporate Filings
- Annual Reports
- Press Releases
- Diversity and Inclusion

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