

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 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

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?

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