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By: [Holly Swan](#) | September 27, 2023

A common misperception about initial public offerings (IPOs) is that they are an immediate liquidity event for both the company and its shareholders. Yet, more often than not, shareholders can be subject to sale restrictions and holding periods, and, if they have the ability to liquidate, they may not plan to do so.

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By: *David Richman* | *September 21, 2023*

Many investors have become complacent sitting on the sidelines due to the high yields they've been earning on cash. Complacency is a strong driver of inertia, perhaps the strongest of all.

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By: *Holly Swan* | *September 20, 2023*

One of the best examples of Uncle Sam being a coach, rather than a referee, is the qualified small business stock (QSBS) exclusion. While you don't need to know the ins and outs of the Internal Revenue Code (IRC), understanding the benefits of QSBS from a tax perspective can help you ask questions to spot issues and opportunities that should be addressed by your clients' tax advisors.

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By: *Holly Swan* | *September 13, 2023*

Often, deeply held biases inhibit rational decision-making and lead to an unwillingness to diversify. Understanding common biases you may encounter and asking the right questions can help you move the concentration conversation toward diversification.

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[4 Steps to Capture Referable Moments](#)

By: David Richman | September 6, 2023

Imagine an exercise that can help align team messaging, unlock your differentiated brand, make first encounters count AND increase the odds of capturing referable moments. That exercise is "ism" development and articulation.

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By: David Richman | August 29, 2023

We always say an advisor's biggest competitor is inertia. Every first meeting with a prospective client has a pivotal "why us" moment—the moment you inspire them to overcome their inertia and choose you as their advisor.

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[Keeping it in the Family: Business Transition Planning](#)

By: Holly Swan | August 23, 2023

Regardless of whether a family business has apparent heirs or children working in management roles, you can help business owner clients understand their options for passing the company on to the next generation.

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By: David Richman | August 16, 2023

In today's markets, are you capturing referable moments or squandering them? A referable moment is anytime the topic of financial markets, money, retirement, financial plans or legacy pops up in conversation when you are not in the room.

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[Decoding the How and When of Inherited Wealth](#)

By: Holly Swan | August 10, 2023

Death is no one's favorite topic, so it's not surprising that parents often fail to communicate their estate plan details with their children. If you have a client or prospective client on the verge of an inheritance, you can bring value to the situation by helping them decode the terms to understand **how** and **when** they will receive the newfound wealth.

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By: David Richman | August 3, 2023

For many advisors, your practice is perhaps your most valuable asset. What can you do to optimize its value for the families you serve as well as your own family? Start thinking about succession earlier than you think you need to.

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[Rise to the Challenge of Attracting Fund Partners](#)

By: Holly Swan | July 27, 2023

Private equity, venture capital, real estate and hedge fund partners are appealing, yet uniquely challenging, wealth holders to attract.

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[Harvesting Opportunities in Fixed Income](#)

By: Holly Swan | July 19, 2023

Despite the Fed's recent pause to rate hikes, today's rising rate environment has us thinking about something we haven't thought about in years—tax-loss harvesting from fixed income portfolios. This opportunity is particularly relevant in the case of older trusts with large allocations to fixed income as well as hefty built-in capital gain within their equities.

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[Think "Gravitas" in Prospecting Calls](#)

By: David Richman | July 14, 2023

If you are following this season's tennis opens, or playing yourself, notice the players' "ready position." This position is rooted in maintaining a state of equanimity—being grounded, even-keeled and ready to return an opponent's serve. Just as equanimity is critical for success in tennis, it is also critical to your success in prospecting calls.

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[Start-up Employees: A Missed Opportunity?](#)

By: Holly Swan | July 12, 2023

If your growth strategy includes attracting and serving serial entrepreneurs, your prospective clients should also include their employees who receive incentive compensation.

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By: David Richman | July 6, 2023

When it comes to conversations with clients, seek to understand more about them, rather than telling them all about you. In the words of Maya Angelou: "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them **feel**."

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Publication details: Wednesday, September 27, 2023 1:40 PM

Page ID: 4600 - <https://www.eatonvance.com/advisor-institute-coachs-corner.php>