

[< Back to The Advisor Institute](#)

# Coach's Corner

Our latest commentary to help you elevate the success of your practice

## Disclosure

*The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.*

## LATEST INSIGHTS

[Attracting Clients](#)

### [Prospecting Calls: Reframe Your Mindset on the Purpose](#)

By: [David Richman](#) | May 8, 2024

[READ THE BLOG POST](#)

[After-Tax Advisor](#)

### [What to Do When Tax Bills Catch Clients by Surprise](#)

By: [Holly Swan](#) | May 1, 2024

[READ THE BLOG POST](#)

[Attracting Clients](#) | [Chasing Positivity](#)

### [Replace the Commonplace: Start Conversations Without "How Are You?"](#)

By: [David Richman](#) | April 30, 2024

[READ THE BLOG POST](#)

[Search our insights by topic category or author](#)

## All Articles (18)

[Attracting Clients](#)

### [Prospecting Calls: Reframe Your Mindset on the Purpose](#)

By: [David Richman](#) | May 8, 2024

When you call a prospective client, would you say that your purpose is to get a meeting? What if you reframe the purpose of your call to determine if a meeting makes sense? You might think there's a subtle difference—hardly. We think the benefits are considerable.

[READ MORE](#) 



David Richman  
Managing Director  
Advisor Institute

---

[After-Tax Advisor](#)

## [What to Do When Tax Bills Catch Clients by Surprise](#)

By: Holly Swan | May 1, 2024

Have you ever met a client who feels undertaxed? No? Neither have we. Paying a tax bill can be even more painful when the amount is larger than expected. Even carefully calculated withholding amounts can be insufficient if clients receive supplemental wage income, investment income or other payments during the year.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

[Attracting Clients](#) | [Chasing Positivity](#)

## [Replace the Commonplace: Start Conversations Without "How Are You?"](#)

By: David Richman | April 30, 2024

Consider the cost of asking this question rather unwittingly, without a moment's reflection at the start of your follow-up phone calls: "How are you?" While cordial and somewhat deferential, it's oh so commonplace.

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#) | [Concentrated Positions](#)

## [Cocktail Parties, Concentrated Positions and the CAR Framework](#)

By: Holly Swan | April 24, 2024

Let's say you meet someone at a cocktail party who, upon hearing what you do for a living, confides they don't know what to do with a highly appreciated concentrated stock position. How can you respond to lay the groundwork for a potential follow-up conversation? Use the CAR framework: Celebrate. Ask. Remind.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#) | [Chasing Positivity](#)

## [Seize Opportunities Presented by Volatility with a Thesis](#)

By: David Richman | April 22, 2024

Recent volatility creates conversation opportunities with existing and prospective clients. Success is anchored to this fundamental tenet:

**"We get paid to have an opinion."**

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#)

### [Mine The BEAT to Help Make First Encounters Count](#)

By: David Richman | April 18, 2024

With so many economic crosscurrents and geopolitical tensions, do first encounters ask you what you're telling clients when they find out you are a financial advisor? Use an ism and, perhaps, a thesis as answers.

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

[After-Tax Advisor](#) | [Elections](#)

### [Uncle Sam Can Provide Certainty in Uncertain Times](#)

By: Holly Swan | April 17, 2024

Is the uncertainty about tax reform resulting in tough conversations with existing and prospective clients? After-tax advisors can help clients navigate the uncertainty and provide clarity with a tax tenet: Uncle Sam can be a coach, not simply a referee.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

[Attracting Clients](#)

### [Discover the Power of the Disengage](#)

By: David Richman | April 10, 2024

Did you approach your last networking event full of intention with the hope of meeting new people, only to get caught up in conversation with one or two encounters? Perhaps it's time to discover the power of "the disengage" when it comes to making first encounters count.

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

[After-Tax Advisor](#)

## [A More Effective Way to Measure Tax Impact](#)

By: Holly Swan | April 4, 2024

Many clients look to their highest marginal bracket when measuring tax impact, yet there's a more accurate way to understand tax impact—the effective tax rate.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#)

## [Leverage The BEAT to Spring Client Conversations Forward](#)

By: David Richman | March 26, 2024

The power of a well-developed thesis can spring conversations forward when existing and prospective clients are buzzing about today's market memes and potential implications to their financial decision-making.

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

[Working with the Wealthy](#)

## [Five Tax-Aware Questions to Ask Before Major Wealth Events](#)

By: Holly Swan | March 20, 2024

Let's explore five open-ended questions you can ask clients undergoing major wealth events—such as an inheritance, business sale or large asset transfer. These questions allow for deeper discovery and can help you ensure their tax planning strategies and financial goals are aligned.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

[Attracting Clients](#) | [Bridge to Referrals](#)

## [Challenge Magnificent Seven Complacency with an Ism](#)

By: David Richman | March 19, 2024

What is your biggest competitor year in and year out? Client inertia.

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

## [Teams](#)

### [A Lesson from the Best Family Practices](#)

By: David Richman | March 13, 2024

Some of the most successful teams we encounter are family practices. This makes us wonder: what are the nuances of such high-functioning family teams that might be replicated in non-family practices?

[READ MORE](#) ♥



David Richman  
Managing Director  
Advisor Institute

---

## [After-Tax Advisor](#)

### [Optimize and Maximize: Tax Planning for Major Life Events](#)

By: Holly Swan | March 6, 2024

Life is full of significant moments that bring joy, change, and new responsibilities. You can bring value to your clients during these times by helping them navigate the income tax planning opportunities that accompany them.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

## [After-Tax Advisor](#)

### [Increase Interest in Split-Interest Giving for Tax Advantages](#)

By: Holly Swan | February 27, 2024

These are uncertain times for taxes. The combination of the Tax Cuts and Jobs Act sunset and an upcoming election has [tax laws hanging in the balance](#). Clients likely feel the uncertainty and wonder what they should do to prepare for different outcomes.

[READ MORE](#) ♥



Holly Swan  
Executive Director  
Advisor Institute

---

## [Teams](#)

### [There Are No Called Balls or Strikes with Succession Opportunities](#)

By: David Richman | February 21, 2024

Recent consults on the topic of succession have highlighted a shift reflecting the demographics of our industry. Mid-career advisors are now in the driver's seat with increasing numbers of older advisors looking for successors.

[READ MORE](#) ▼



David Richman  
Managing Director  
Advisor Institute

---

[After-Tax Advisor](#) | [Elections](#)

## [Tax Laws Hang in the Balance: Preparing Clients for a Potential Sunset](#)

By: *Holly Swan* | February 16, 2024

Let's look past the typical 2024 election headlines and consider one issue that might not be in your election newsfeed—the possible sunset of the Tax Cuts and Jobs Act of 2017 (TCJA) at the end of 2025.

[READ MORE](#) ▼



Holly Swan  
Executive Director  
Advisor Institute

---

[Concentrated Positions](#)

## [Solve the Concentration Conundrum with Exchange Funds](#)

By: *Holly Swan* | February 14, 2024

Investing in a single stock or concentrated position is both exciting and risky—offering the potential for substantial returns while simultaneously exposing investors to significant volatility. Therein lies the conundrum of concentrated positions.

[READ MORE](#) ▼



Holly Swan  
Executive Director  
Advisor Institute



## HEADQUARTERS

One Post Office Square  
Boston, MA 02110

## Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed  
Accounts](#)

[Closed-End Funds and  
Term Trusts](#)

## Insights

[Advisory Blog](#)

[The BEAT](#)

[Market Update Events](#)

[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](#)

<a href="#">Accessibility</a>	<a href="#">Business Continuity</a>	<a href="#">Privacy &amp; Cookies</a>	<a href="#">Your Privacy Choices</a>	<a href="#">Terms &amp; Conditions</a>	<a href="#">Careers</a>	<a href="#">Contact</a>
<a href="#">Investor Account Access</a>	<a href="#">Morgan Stanley Investment Management Terms of Use</a>					

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

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

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved.

Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:49 AM

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