< 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 | Concentrated Positions Cocktail Parties, Concentrated Positions and the CAR Framework By: Holly Swan | April 24, 2024 Attracting Clients | Bridge to Referrals | Chasing Positivity Seize Opportunities Presented by Volatility with a Thesis By: David Richman | April 22, 2024

**READ THE BLOG POST** 

**READ THE BLOG POST** 

Attracting Clients | Bridge to Referrals Mine The BEAT to Help Make First Encounters Count By: David Richman | April 18, 2024

**READ THE BLOG POST** 

### Search our insights by topic category or author

### All Articles (1)

<u>Attracting Clients | Bridge to Referrals | Chasing Positivity</u> 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."



David Richman Managing Director Advisor Institute

## Eaton Vance

HEAD One F Bosto

	Investments	<u>Insights</u>	<u>Taxes &amp; Tools</u>	<u>Resources</u>
Eterter DQUARTERS Post Office Square con, MA 02110	Eaton Vance Funds	Advisory Blog	Investment Tax Center	Forms & E-Delivery
	Parametric Funds	The BEAT	Tax Information	Mutual Funds & Abandoned
	<u>Calvert Funds</u>	<u>Market Update Events</u>	Investment Tax Calculator	<u>Property</u>
	Separately Managed	The Advisor Institute	Laddered Investing Interest	DST Vision
	<u>Accounts</u> <u>Closed-End Funds and</u> <u>Term Trusts</u>		Rate Scenario Tool	Active Advisor
			Concentrated Stock Position Calculator	Corporate Filings
				Annual Reports
			<u>Tax-Equivalent Yield</u> <u>Calculator</u>	Press Releases
				Diversity and Inclusion

in 🎔 🖾 🖨

<u>Accessibility</u>	Business Co	ontinuity	Privacy & Cookies	Your Privacy Choices 🕢 🗙	Terms & Conditions	<u>Careers</u>	<u>Contact</u>	
Investor Account Access Morga		<u>Morgan</u>	Stanley Investment M	anagement Terms of Use				

To report a website vulnerability, please go to <u>Responsible Disclosure</u>.

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 <u>download a copy **here**</u>. 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 <u>download a copy **here**</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or <u>download a copy **here**</u>.

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