

[< 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

[READ THE BLOG POST](#)

[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](#)

[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 (2)

**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.



Holly Swan  
Executive Director  
Advisor Institute

## Working with the Wealthy [Timing Matters for ISOs and AMT](#)

By: *Holly Swan* | February 7, 2024

During tax season, you can be of great value to clients even though you're not a tax professional. This is especially true for your clients who receive employer stock. When it comes to incentive compensation, remember:

[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](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#)   | [Terms & Conditions](#) | [Careers](#) | [Contact](#) |  
[Investor Account Access](#) | [Morgan Stanley Investment Management Terms of Use](#)

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>