

Help clients think ahead to improve their tax experience

WATCH FLASH INSIGHT

FEATURED RESOURCE

4 Approaches to Help Reduce Taxes

By understanding how these approaches can help reduce taxes, you can build a better tax experience for your clients

EXPLORE NOW

Insights

Thought leadership to help you grow your business

Tax Forward 365® Monthly Planner

Timely actions and resources for adding year-round value



The After-Tax Advisor®

Provide year-round, tax-forward planning

DOWNLOAD

More from Eaton Vance

Tax Education Center

Explore a variety of topics to help clients grow after-tax wealth

VISIT THE TAX EDUCATION CENTER

Tax Tools

Interactive tools to help your clients grow and preserve after-tax wealth

VISIT TAX TOOLS



Coach's Corner Blog

Commentary to help you elevate the success of your practice

LATEST AFTER-TAX ADVISOR BLOG POSTS

After-Tax Advisor | Elections Talking Tax Reform? Stick with the Facts By: Holly Swan | May 15, 2024 After-Tax Advisor What to Do When Tax Bills Catch Clients by Surprise By: Holly Swan | May 1, 2024

READ MORE

READ MORE

READ ALL AFTER-TAX ADVISOR POSTS

Friends of the Institute

Financial advisors, subscribe and receive monthly email insights.



SUBSCRIBE

Eaton Vance

H O B

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

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 <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 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: 32073 - https://www.eatonvance.com/after-tax-advisor.php