

[< Back to The Advisor Institute](#)

The After-Tax Advisor®

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

[DOWNLOAD](#) 

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

[READ MORE](#)

After-Tax Advisor

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

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

[READ MORE](#)

[READ ALL AFTER-TAX ADVISOR POSTS](#)

Friends of the Institute

Financial advisors, subscribe and receive monthly email insights.



[SUBSCRIBE](#)



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.

