

[< Back to The Advisor Institute](#)

# Attracting Clients

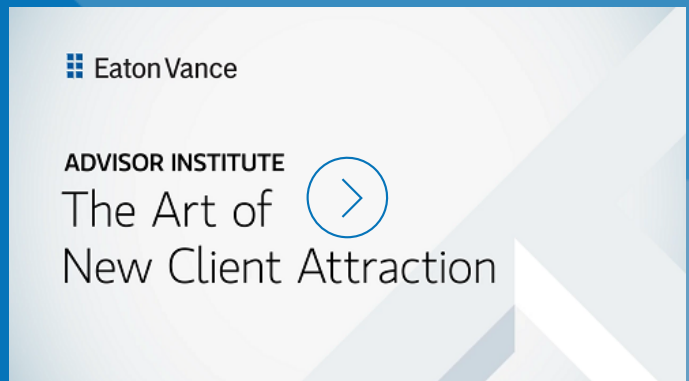
Activate a growth mindset to expand your business

[WATCH FLASH INSIGHT](#)

## FEATURED VIDEO

### The Art of New Client Attraction


Converting prospective clients into clients takes a certain mindset and a degree of artistry in four dimensions of conversation. (2:19)



## AUDIOS

### The 4 Dimensions of New Client Attraction

## Make First Encounters Count


 Eaton Vance

ADVISOR INSTITUTE

### Attracting Clients

Make First Encounters Count

## Generate More Meetings


 Eaton Vance

ADVISOR INSTITUTE

### Attracting Clients

Generate More Meetings

## Run Better First Meetings


 Eaton Vance

ADVISOR INSTITUTE

### Attracting Clients

Run Better First Meetings

## Capture Referable Moments

 Eaton Vance

ADVISOR INSTITUTE

### Attracting Clients

Capture Referable Moments



## Insights

Thought leadership to help you grow your business

### A Lifetime of Saturdays

Approaches to the "soft side" of a retirement conversation

[DOWNLOAD](#) 

### Better First Meetings

Run more purposeful, coordinated and conclusive first meetings

[DOWNLOAD](#) 



# Coach's Corner Blog

Commentary to help you elevate the success of your practice

## LATEST ATTRACTING CLIENTS BLOG POSTS

**Attracting Clients**  
[Turn First Encounters into Follow-Up Phone Calls](#)

By: [David Richman](#) | May 16, 2024

[READ MORE](#)

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

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

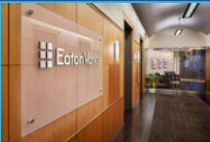
[READ MORE](#)

[READ ALL ATTRACTING CLIENTS 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](#)

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: 40524 - <https://www.eatonvance.com/attracting-clients.php>