

[< Back to The Advisor Institute](#)

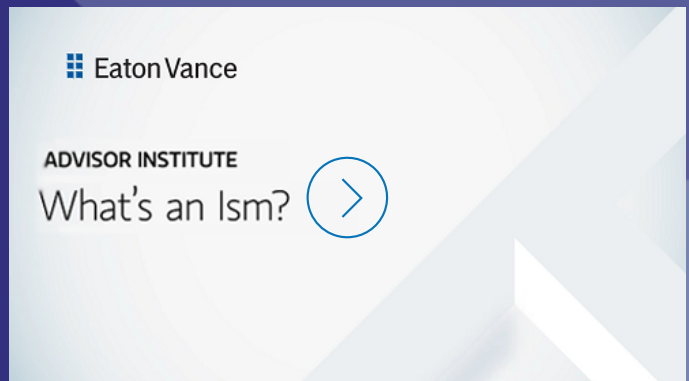
# Bridge to Referrals

Build a bridge to referrals with more purposeful messaging

## FEATURED VIDEO

### What's an ism?

David Richman explains how "isms" can help strengthen your personal brand and build a bridge to referrals. (1:32)





# Coach's Corner Blog

Commentary to help you elevate the success of your practice

## LATEST BRIDGE TO REFERRALS BLOG POSTS

[Attracting Clients](#) | [Bridge to Referrals](#)  
[Missing the Upside is the Same as Participating in the Downside](#)  
By: [David Richman](#) | August 1, 2024

[READ MORE](#)

[Attracting Clients](#) | [Bridge to Referrals](#) | [Teams](#)  
[A Multiplier Effect for Team Growth](#)  
By: [David Richman](#) | July 25, 2024

[READ MORE](#)

[READ ALL BRIDGE TO REFERRALS 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](#)  
[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 & Unclaimed Property](#)  
[DST Vision](#)  
[Active Advisor](#)  
[Corporate Filings](#)  
[Annual Reports](#)  
[Press Releases](#)  
[Diversity and Inclusion](#)

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, August 20, 2024 5:46 AM

Page ID: 28960 - <https://www.eatonvance.com/bridge-to-referrals.php>