

PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

Business Continuity Program

Overview

Eaton Vance takes seriously its fiduciary responsibilities to clients and shareholders, not only for superior investment performance, but also in terms of business continuity should an event arise causing interruption of normal operations.

Continuity Objectives

The primary objectives of the Eaton Vance Business Continuity program are to:

- Minimize the likelihood of a business interruption and associated impacts
- Resume operations quickly in the event a business interruption does occur

Business Continuity Plans

Eaton Vance Business Continuity Plans are designed to enable the various departments to respond to business interrupting events of varying scope – from minor incidents to the loss of an Eaton Vance facility and/or data center. Plans document data requirements and backup methods, mission critical applications, financial and operational assessments, alternate communications to customers and employees, alternate work locations for employees, critical service provider impacts and actions, and, where applicable, regulatory reporting.

Customer Access To Funds

Eaton Vance's recovery plans and capabilities ensure that access to funds and account information should not be affected under most circumstances. To access your accounts, either call 1-800-262-1122 or <u>login here</u>. Please note that extreme circumstances beyond our control may impact our ability to service our customers.











HEADQUARTERS One Post Office Square Boston, MA 02110

Eaton Vance Funds

<u>Investments</u>

Parametric Funds

Calvert Funds Separately Managed

Accounts

Closed-End Funds and Term Trusts

<u>Insights</u> **Advisory Blog**

The BEAT

Market Update EventsContent for **Investment Professionals**

The Advisor Institute

Investment Tax Center

Taxes & Tools

Tax Information

Investment Tax Calculator

Laddered Investing Interest Rate Scenario Tool

Concentrated Stock Position Calculator

Tax-Equivalent Yield

Calculator

Forms & E-Delivery

Mutual Funds & Unclaimed

Property

Resources

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.

뎎 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: Thursday, May 9, 2024 6:08 AM

Page ID: 44930 - https://www.eatonvance.com/business-continuity-program.php