TAX FORWARD 365®

Diversifying Concentrated Stock Positions

Many business owners, corporate executives and other investors have accumulated significant wealth by owning large concentrations of a single stock – wealth that needs strategic diversification.

How we can help

TOOLS & CALCULATORS
SPOTLIGHT STRATEGIES
ACTIONABLE INSIGHTS
ADVISOR RESOURCES

TOOLS & CALCULATORS

Show clients how diversifying their concentrated stock positions on a tax-deferred basis may be a better option than a taxable sale.

CONCENTRATED STOCK POSITION CALCULATOR

ACCESS MORE TAX FORWARD TOOLS

SPOTLIGHT STRATEGIES

Choose what best fits your clients' personal diversification needs, financial objectives and/or philanthropic goals.

Parametric Custom Core®
Separately managed accounts that offer active tax management, a rules-based approach and a range of customization alternatives - at a cost that compares favorably with most ETFs and mutual funds.
LEARN MORE ▸

U.S. Legacy Income Trusts®
Next-gen planned giving instruments that offer tax-advantaged income for life and a legacy of charitable giving, established by the U.S. Charitable Gift Trust®.
LEARN MORE ▸

ACTIONABLE INSIGHTS

Focus and reinforce your client conversations with practical, relevant commentary.

Advisor Institute, Coach's Corner blog: The Concentration Conversation: Tax Code to the Rescue

VIEW POST ►

Advisor Institute, Coach's Corner blog: Below-the-Waterline Risk

VIEW POST ►

ADVISOR RESOURCES

Dive deeper into our spotlight strategies and stay on top of market trends with resources from Eaton Vance and the U.S. Charitable Gift Trust®.

Concentrated stock positions: Know the risks

VIEW FLYER ►

Client Transitions from Underperforming Active Manager to Custom Core®, Maximizes Tax Efficiency

VIEW CASE STUDY ►

Diversifying concentrated stock positions with U.S. Legacy Income Trusts - CA resident

LEARN MORE ►

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Click here for Important Information and Disclosures related to the U.S. Charitable Gift Trust®

The U.S. Charitable Gift Trust® (Gift Trust) is a tax-exempt public charity offering donor-advised funds and the U.S. Legacy Income Trusts (Legacy Income Trusts) are pooled income funds described in Section 642(c)(5) of the Internal Revenue Code. All activities of the Gift Trust and the Legacy Income Trusts and the participation of Donors and income beneficiaries in the Legacy Income Trusts are subject to the requirements of state and federal law, the terms and conditions of the applicable Declaration of Trust, the current information statement and/or gifting booklet and the completed forms submitted by each Donor. The Board of Directors of the Gift Trust (Board of Directors) reserves the right to modify the program of the Gift Trust and the Legacy Income Trusts at any time, subject to the provisions of the applicable Declaration of Trust and state and federal law. Any contribution to the Gift Trust or a Legacy Income Trust, once accepted by Eaton Vance Trust Company (Trustee), represents an irrevocable commitment. Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Gift Trust, the Trustee and the Board of Directors. Donors to the Gift Trust and the Legacy Income Trusts should be motivated by charitable intent. As charitable giving vehicles, the Gift Trust and the Legacy Income Trusts should not be treated as, and are not designed to compete with, investments made for private gain. An intention to benefit the Gift Trust and one or more qualified charitable organizations eligible for support by the Gift Trust should be a significant part of the decision to contribute. The tax consequences of contributing to the Gift Trust or a Legacy Income Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Distributions to income beneficiaries from a Legacy Income Trust are not guaranteed by any party, and are subject to investment risk. In considering potential changes in annual distribution rates of the Legacy Income Trusts, the Trustee will assess their long-term earnings potential and seek to balance the interests of current and future income beneficiaries and the charitable remainder interests. Neither the Gift Trust nor the Legacy Income Trusts has been registered under federal securities laws, pursuant to available exemptions. Neither the Gift Trust nor the Legacy Income Trusts is guaranteed or insured by the United

Eaton Vance

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