

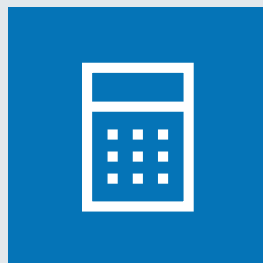


## TAX FORWARD ■ 365®

### 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®.

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## 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

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

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## 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

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