

# Customized Investing Center

## A personalized approach

Create customized solutions that reflect your clients' values and investment preferences.

## Next-level investing

Address a variety of client needs with highly customizable solutions.

Reflect personal values through responsible investing strategies

Access interactive tax tools that engage and educate

Reduce exposure to concentrated stock



Incorporate industry, sector or security exclusions

Tailor portfolios for credit quality, maturity and state preference

Build customized benchmark indexes

Broad investment choice to satisfy dynamic investor goals



Customized, client-driven passive  
SMA portfolios that employ a  
transparent rules-based approach



A global leader in responsible  
investing focusing on proprietary  
research and active engagement

Morgan Stanley

INVESTMENT MANAGEMENT

An array of customized SMA  
strategies to address the unique  
challenges of high-net-worth  
investors

## Explore separately managed accounts

Separately managed accounts (SMAs) offer flexibility, personalization and tax efficiency that go beyond what can be achieved through mutual funds and ETFs.

### A leader in SMA investing

Together with our highly specialized brands, Eaton Vance is one of the largest SMA managers in the U.S.\*

### Broad selection of strategies

Customizable equity, fixed-income, ESG-focused, and alternative strategies.

[LEARN MORE](#)

Active, year-round tax management

Access strategies designed to help minimize tax liability and enhance after-tax return potential.

[TAX-EXEMPT INVESTING](#)

[TAX MANAGEMENT STRATEGIES](#)



## Explore more Eaton Vance investing strategies

### Tax Management Center

Help investors keep more of what they earn

[VISIT TAX MANAGEMENT CENTER](#)

### Responsible Investing Center

Diverse approaches for ESG-focused investors.

[VISIT RESPONSIBLE INVESTING CENTER](#)

## Questions about where to start with customized investing?

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\*Source: Cerulli Associates: The Cerulli Edge - U.S. Managed Accounts Edition. Based on AUM of Parametric Portfolio Associates, Morgan Stanley Investment Management, Atlanta Capital Management Co. and Eaton Vance among Separate Account Consultant Program Asset Management Groups, as of Q1 2023.

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