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.

Reflected 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
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.

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?

CONTACT US


Advisory services described may be provided by Eaton Vance brands: Parametric Portfolio Associates LLC, Eaton Vance Management, Calvert Research and Management or Atlanta Capital Management Company, LLC; each an SEC-Registered Investment Adviser. Certain Calvert SMA strategies are only available through advisory services provided by Calvert affiliates, including Parametric Portfolio Associates LLC and Atlanta Capital Management Company, LLC. Please contact Calvert for additional information about these strategies.
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. Two International Place, Boston, MA 02110. Member FINRA / SIPC. Exchange-traded funds are distributed by Foreside Fund Services, LLC.