

PRODUCT FINDER

**WEALTH STRATEGIES** 

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

## Tax Education Center

Explore a variety of topics to help clients grow after-tax wealth

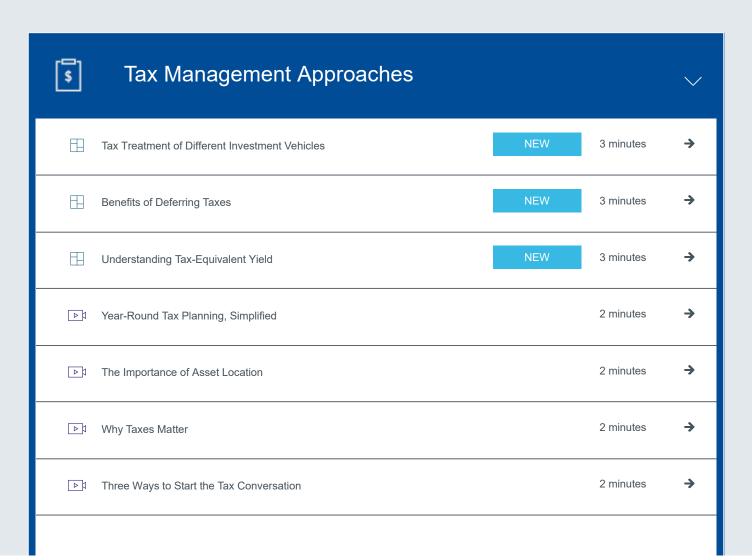
Tax-Forward Approach

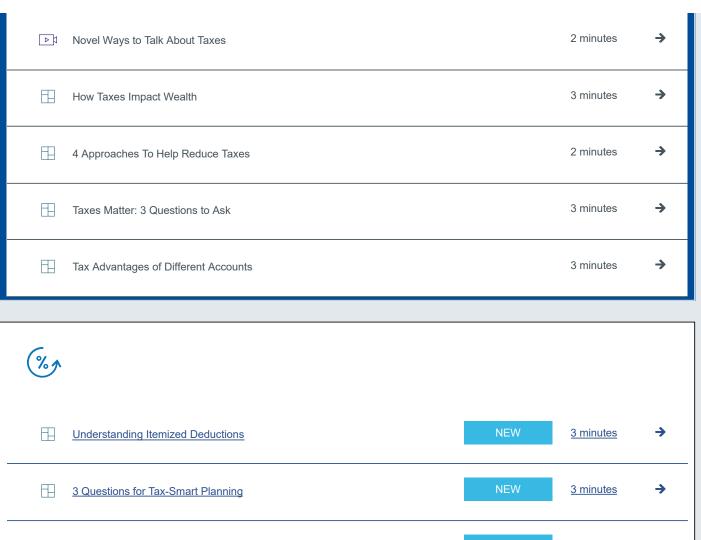
Tax Tools

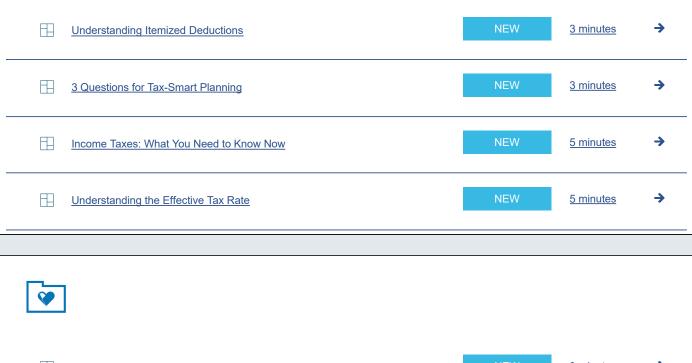
Resources

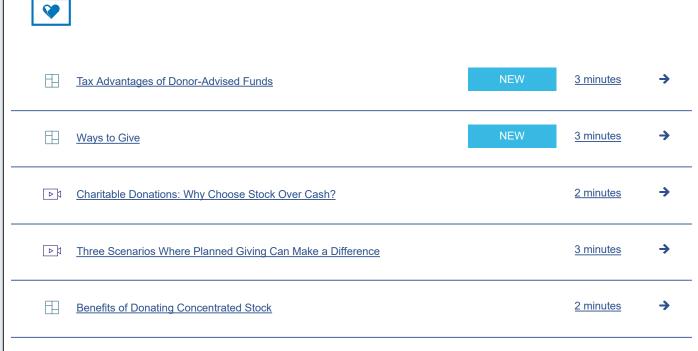
## Take A Tax-Forward Approach

Differentiate your practice with these timely topics designed to drive meaningful conversations and help clients keep more of what they earn.









<b>□</b>				
	Start the Wealth Transfer Conversation	NEW	3 minutes	<b>→</b>
	Beyond Taxes: Reasons for Estate Planning	NEW	3 minutes	<b>→</b>
	Understanding the Estate Tax	NEW	3 minutes	<b>→</b>
	Know the Core Estate Planning Documents	NEW	3 minutes	<b>→</b>
Ħ	Tax Planning for Life Events		3 minutes	<b>→</b>

త్ని			
	When to Consider Diversifying Concentrated Shares	3 minutes	<b>→</b>
	Three Types of Incentive Compensation That Require Tax Planning	3 minutes	<b>→</b>
	Reducing Taxes on Incentive Compensation	2 minutes	<b>→</b>
	Restricted Stock Units (RSUs): Incentive Compensation	3 minutes	<b>→</b>
	Nonqualified Stock Options (NQSOs): Incentive Compensation	2 minutes	<b>→</b>
	Incentive Stock Options (ISOs): Incentive Compensation	3 minutes	<b>→</b>
	Investment Concentration: 3 Questions to Ask	3 minutes	<b>→</b>

## Access Year-Round Tax Tools



Investment Tax Calculator

Determine your combined total tax rate, including federal, state and local taxes, for investment income

and gains.

Tax-Equivalent Yield Calculator
Compare yields of in-state muni bonds with
out-of-state munis and taxable bonds on a
tax-equivalent basis.

Concentrated Stock Position

Calculator

See how diversifying your portfolio on a tax-deferred basis may be a better option than a taxable sale.



Laddered Investing Interest Rate Scenario Tool

Explore how laddered portfolios may perform in an environment of

changing interest rates.



Charitable Tax Benefit Calculator

See the potential savings in income taxes you could realize by donating cash or appreciated securities.

## **Explore More Tax Resources From Our Experts**



<u>Talking Taxes with Clients</u> <u>Guidance for framing tax conversations</u>





2024 Tax Information
Rates, schedules and contribution limits



Tax Forward 365® Planner
Timely actions and resources for adding
year-round value









**HEADQUARTERS**One Post Office Square
Boston, MA 02110

Investments

Eaton Vance Funds

Parametric Funds

Calvert Funds

Separately Managed

Accounts

Closed-End Funds and Term Trusts

<u>Insights</u>

Advisory Blog

The BEAT

<u>1110 DL7 (1</u>

The Advisor Institute

Market Update Events

Taxes & Tools

Investment Tax Center

investment lax Cen

Tax Information

Investment Tax Calculator

Laddered Investing Interest
Rate Scenario Tool

Concentrated Stock
Position Calculator

Tax-Equivalent Yield

Calculator

Resources

Forms & E-Delivery

Mutual Funds & Abandoned

Property

DST Vision

Active Advisor

Corporate Filings

Annual Reports

<u>Press Releases</u>

**Diversity and Inclusion** 

Accessibility Business Continuity Privacy & Cookies Your Privacy Choices VX 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 <u>download a copy here</u>. 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 <u>download a copy here</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or <u>download a copy here</u>.

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 <u>FINRA</u> / <u>SIPC</u>. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, April 9, 2024 6:09 AM

Page ID: 42062 - https://www.eatonvance.com/eaton-vance-tax-education-center.php