

## **Tax Education Center**

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

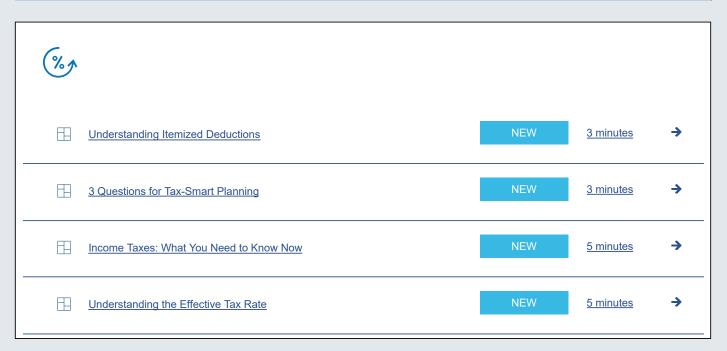
Tax-Forward Approach Tax Tools Resources

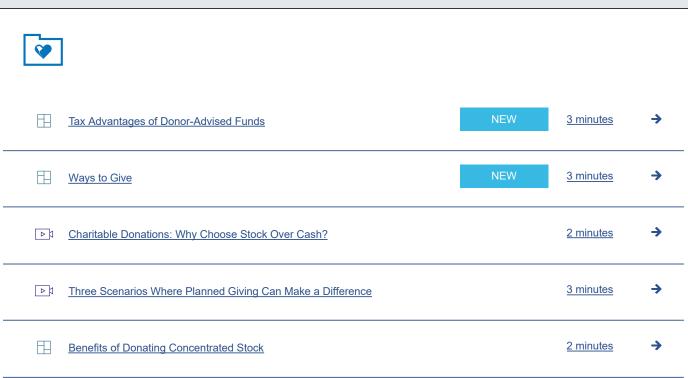
## Take A Tax-Forward Approach

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

\$	Tax Management Approaches			$\checkmark$
	Tax Treatment of Different Investment Vehicles	NEW	3 minutes	<b>&gt;</b>
₿	Benefits of Deferring Taxes	NEW	3 minutes	⇒
E	Understanding Tax-Equivalent Yield	NEW	3 minutes	<b>&gt;</b>
لرط ا	Year-Round Tax Planning, Simplified		2 minutes	⇒
لرط ا	The Importance of Asset Location		2 minutes	⇒
لرط ا	Why Taxes Matter		2 minutes	<b>&gt;</b>
Ľ⊲	Three Ways to Start the Tax Conversation		2 minutes	<b>&gt;</b>

لرط ا	Novel Ways to Talk About Taxes	2 minutes	→
E	How Taxes Impact Wealth	3 minutes	⇒
	4 Approaches To Help Reduce Taxes	2 minutes	>
	Taxes Matter: 3 Questions to Ask	3 minutes	<b>&gt;</b>
E	Tax Advantages of Different Accounts	3 minutes	<i>&gt;</i>





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

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

## Access Year-Round Tax Tools

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Investment Tax Calculator Determine your combined total tax rate, including federal, state and local taxes, for investment income and gains. <u>Tax-Equivalent Yield Calculator</u> <u>Compare yields of in-state muni bonds with</u> <u>out-of-state munis and taxable bonds on a</u> <u>tax-equivalent basis.</u> <u>Concentrated Stock Position</u> <u>Calculator</u> <u>See how diversifying your portfolio on a</u> <u>tax-deferred basis may be a better option</u> than a taxable sale.



Laddered Investing Interest Rate Scenario Tool Explore how laddered portfolios may perform in an environment of changing interest rates. <u>Charitable Tax Benefit Calculator</u> <u>See the potential savings in income taxes you could realize by</u> <u>donating cash or appreciated securities.</u>

Explore More Tax Resources From Our Experts



Eaton Vance

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	Investments	<u>Insights</u>	<u>Taxes &amp; Tools</u>	<u>Resources</u>
HEnterliere Lee Eter	Eaton Vance Funds	Advisory Blog	Investment Tax Center	Forms & E-Delivery
	Parametric Funds	The BEAT	Tax Information	Mutual Funds & Unclaimed
	<u>Calvert Funds</u>	Market Update Events	Investment Tax Calculator	<u>Property</u>
HEADQUARTERS One Post Office Square	Separately Managed	The Advisor Institute	Laddered Investing Interest	DST Vision
Boston, MA 02110	<u>Accounts</u>		Rate Scenario Tool	Active Advisor
	Closed-End Funds and		Concentrated Stock	Corporate Filings
	<u>Term Trusts</u>		Position Calculator	Annual Reports
			<u>Tax-Equivalent Yield</u> Calculator	Press Releases
				Diversity and Inclusion
Accessibility Business	Continuity Privacy & Cookies	Your Privacy Choices	Terms & Conditions Careers	Contact

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