High-Net-Worth Investing Center

When traditional strategies are not enough

With affluence comes unique demands, and Eaton Vance has customizable strategies to help meet the demands of your most discerning clients.

Look to Eaton Vance for solutions to your clients' most significant investment challenges.

Customization

One-of-a-kind portfolios designed to help HNW clients pursue their financial and philanthropic goals

Tax management

Strategies to help maximize after-tax wealth

Specialized strategies

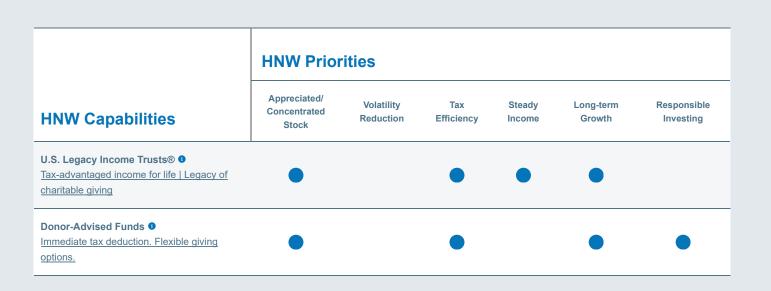
Strategies designed to minimize taxes, manage volatility, enhance total return or generate income

Innovative solutions for HNW investors

Eaton Vance and its brands offer a range of investing and charitable giving solutions.

	HNW Priorities					
HNW Capabilities	Concentrated Stock	Volatility Management	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing
Parametric Custom Core® Custom, tax-managed equity portfolios	•		•		•	•
Parametric Option Overlay Strategies Seek to enhance returns on existing assets	•	•				
Parametric TABS Managed Municipals Pursue tax-exempt income and capital preservation			•	•		
Parametric TABS Municipal Ladders Seek to minimize interest-rate risk and provide tax-exempt income			•	•		•
Parametric Corporate Ladders Pursue income and capital preservation			•	•		•
Calvert Research and Management Research-based Responsible Investing						•

Charitable giving solutions with the U.S. Charitable Gift Trust®



Tools for high-net-worth planning

Take your clients to the next level with our suite of online calculators.

Investment Tax Calculator

Charitable Income Tax
Deduction Calculator



LAUNCH TOOL

LAUNCH TOOL

Concentrated Stock Position Calculator

Laddered Investing Interest Rate Scenario Tool

LAUNCH TOOL

LAUNCH TOOL

Let's talk about your HNW clients' objectives and needs.

CONTACT US

INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industry-leading

HIGH-CONVICTION EQUITIES

ACTIVE FIXED INCOME
AND LIQUIDITY

ALTERNATIVE INVESTMENTS

CUSTOMIZED SOLUTIONS

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Customized Investing Center

Flexible solutions from the leader in SMA investing

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Tax Management Center

Help investors keep more of what they earn

VISIT TAX MANAGEMENT CENTER

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Investing involves risk, including the risk of loss. There generally is limited public information about municipal issuers. As interest rates rise, the value of certain income investments is likely to decline. Investments in debt instruments may be affected by changes in the creditworthiness of the issuer and are subject to the risk of nonpayment of principal and interest. The value of income securities also may decline because of real or perceived concerns about the issuer's ability to make principal and interest payments. The value of equity securities is sensitive to stock market volatility. Investing primarily in responsible investments carries the risk that, under certain market conditions, a strategy may under-perform others that do not utilize a responsible investment strategy. In evaluating a company, the Advisor is dependent upon information and data that may be incomplete, inaccurate or unavailable, which could cause the Advisor to incorrectly assess a company's ESG performance. Option Strategy Risk – The effectiveness of an option strategy depends on a general mbalance of natural buyers over natural sellers of index options. This imbalance could decrease or be eliminated, which could have an adverse effect on a client portfolio. Taxes - Market conditions may limit the ability to generate tax losses or to generate dividend income taxed at favorable tax rates. The ability to utilize various tax-managed techniques may be curtailed or eliminated in the future by tax legislation or regulation. Investing entails risks, and there can be no assurance that Eaton Vance (and its affiliates) will achieve profits or avoid incurring losses.



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Publication details: Tuesday, March 5, 2024 10:48 AM

Page ID: 38587 - https://www.eatonvance.com/high-net-worth.php