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INSIGHTS

#### Eaton Vance

PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

TAXES AND TOOLS

## 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.

Unique High-Net-Worth (HNW) Solutions\*

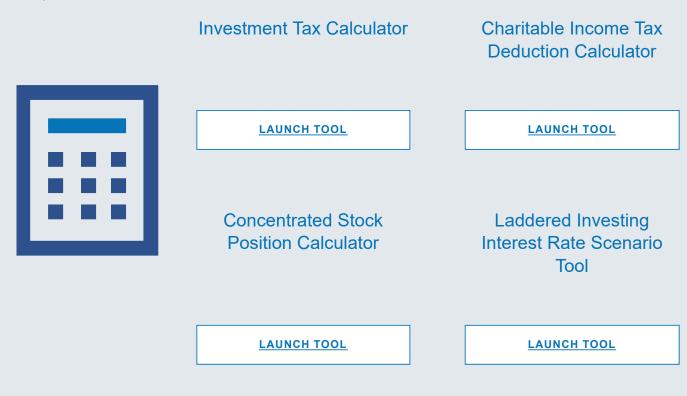
	HNW Priorities						
HNW Capabilities	Concentrated Stock	Volatility Management	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing	
Parametric Custom Core® <u>Custom, tax-managed equity portfolios</u>			•		•	•	
Parametric Option Overlay Strategies Seek to enhance returns on existing assets	•						
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						•	

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

	HNW Priorities						
HNW Capabilities	Appreciated/ Concentrated Stock	Volatility Reduction	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing	
U.S. Legacy Income Trusts® <u>Tax-advantaged income for life   Legacy of</u> <u>charitable giving</u>			•	•	•		
Donor-Advised Funds Immediate tax deduction. Flexible giving options.	•		•		•	•	

## Tools for high-net-worth planning

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



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

customization and tax management solutions.

HIGH-CONVICTION	ACTIVE FIXED INCOME	ALTERNATIVE	CUSTOMIZED	SUSTAINABLE	TAX
EQUITIES	AND LIQUIDITY	INVESTMENTS	SOLUTIONS	INVESTING	SOLUTIONS

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#### **Customized Investing Center**

Flexible solutions from the leader in SMA investing

VISIT CUSTOMIZED INVESTING CENTER

#### Tax Management Center

Help investors keep more of what they earn

**VISIT TAX MANAGEMENT CENTER** 

Advisory services offered by Eaton Vance Management, Parametric Portfolio Associates LLC and Calvert Research and Management, SEC-registered investment advisers and affiliates of Eaton Vance.

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#### Eaton Vance



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