



## Tax Forward 365®

Growing after-tax wealth takes tax-forward thinking



### TAX FORWARD 365® MONTHLY PLANNER

Timely actions and resources  
for adding year-round value.

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### HOW CAN WE HELP?

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[DIVERSIFY CONCENTRATED STOCK POSITIONS](#)

[EMPLOY TAX MANAGEMENT STRATEGIES](#)

[MAXIMIZE CHARITABLE GIVING STRATEGIES](#)



### Eaton Vance Parametric Investment Tax Calculator

See your client's combined total tax rate – including federal, state and local taxes – for various investment income sources.

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### The After-Tax Advisor®

Tap into this Advisor Institute program to demonstrate your value, differentiate your practice and build an optimal tax experience for your clients.

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## Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed  
Accounts](#)

[Closed-End Funds and  
Term Trusts](#)

## Insights

[Advisory Blog](#)

[The BEAT](#)

[Market Update Events](#)

[The Advisor Institute](#)

## Taxes & Tools

[Investment Tax Center](#)

[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](#)

[Press Releases](#)

[Diversity and Inclusion](#)

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