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WEALTH STRATEGIES

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INSIGHTS

TAXES AND TOOLS

Tax Forward 365®

Growing after-tax wealth takes tax-forward thinking all year long



Use our interactive planner to drive timely tax conversations, strengthen client relationships and differentiate your practice.





More Tax-Forward Tools & Resources



Tax-Exempt Investing Solutions

The municipal bond market is growing more complex.



Concentrated Stock Positions

<u>Large concentrations may not</u> <u>be tax efficient.</u>



Tax Management Strategies

<u>Taxes can erode portfolio</u> <u>returns and disposable income.</u>



Charitable Giving Strategies

Philanthropy is often overlooked as a key strategy.



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.





The After-Tax Advisor®

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Access













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