

# Tax Forward 365®

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

## Tax Forward 365® Monthly Planner

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

Start Now



## More Tax-Forward Tools & Resources



### [Tax-Exempt Investing Solutions](#)

The municipal bond market is growing more complex.



### [Concentrated Stock Positions](#)

Large concentrations may not be tax efficient.



### [Tax Management Strategies](#)

Taxes can erode portfolio returns and disposable income.



### [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.

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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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