

PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

Retirement Services

Eaton Vance has extensive experience working with financial advisors servicing the defined contribution and defined benefit market.

Thought Leadership

Explore our series on fixed-income, which will underscore how high-yield bonds have historically provided high current income with lower volatility than equities.

Explore our value-add programs and tools

- Download the Monthly Market Monitor »
- Advisory Blog
- Eaton Vance on Washington

Retirement Plan Prospector

• Download the Retirement Plan Prospector »

Past performance is no guarantee of future results.

Focused Investment Strategies

Equity

- Eaton Vance Balanced Fund
- Eaton Vance Growth Fund
- Eaton Vance Large-Cap Value Fund
- Eaton Vance Stock Fund
- Parametric International Equity Fund

Fixed Income

- Eaton Vance Floating-Rate Advantage Fund
- Eaton Vance High Income Opportunities Fund
- Eaton Vance Income Fund of Boston

RPAG and fi360 Fiduciary Score®

Build a better retirement program for your clients

RPAG and a fi360 Fiduciary Score[®] can help fiduciaries ensure that investments under their watch meet important due diligence criteria and regulatory standards in the categories including:

- Peer performance
- Portfolio management stability
- Asset class composition
- Management style consistency
- Expense ratios

New Class R6 Shares

We now offer Class R6 shares for specific funds

- Minimum initial purchase is waived for employer-sponsored retirement plans
- Offered at net asset value to employer sponsored retirement plans and certain other investors
- Not subject to any distribution, service, sub-accounting, recordkeeping or similar fees

Download: Eaton Vance R6 shares Flyer »

Download: Calvert R6 shares Flyer »

The following mutual funds are now offering Class R6 shares:

- Atlanta Capital Select Fund
- Balanced Fund
- Calvert Bond Fund
- Calvert Emerging Markets Equity Fund
- Calvert Equity Fund
- Calvert Floating-Rate Advantage Fund
- Calvert Ultra-Short Duration Income Fund
- Calvert US Large-Cap Core Responsible Index Fund
- Emerging Markets Debt Opportunities Fund
- Global Macro Absolute Return Fund
- Global Macro Absolute Return Advantage Fund
- Income Fund of Boston
- Large-Cap Value Fund
- Multisector Income Fund
- Parametric Emerging Markets Fund
- Parametric International Equity Fund

Investing entails risks and there can be no assurance that Eaton Vance (and its brands) will achieve profits or avoid incurring losses.

















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<u>Investments</u>

Eaton Vance Funds

Parametric Funds

Calvert Funds

Separately Managed

Accounts

Closed-End Funds and

Term Trusts

<u>Insights</u>

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

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Property

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