

Navigating 2024: Politics, Policies and Portfolios

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In the run up to Election Day, tax uncertainty will likely climb higher on investors' wall of worry. We offer timely insights, interactive tools and an array of customizable, tax-smart strategies, including Parametric Separately Managed Accounts across equity and fixed income, innovative charitable giving solutions and private offerings to help your clients stay focused on what they can control.

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Personalize and Optimize Tax Efficiency

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A tax-exempt public charity offering donor-advised funds and other tax-advantaged charitable giving strategies, including U.S. Legacy Income Trusts^{®.1}

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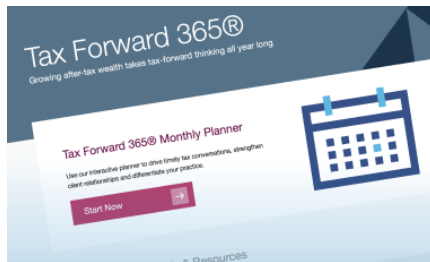
Explore a variety of viewpoints on the evolving tax landscape and its impact on the markets, investors and their portfolios.

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Access timely election-related commentary designed to help you drive meaningful, after-tax conversations with your clients.

RESOURCES

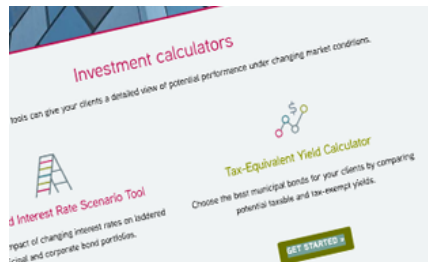
Plan and Prepare Tax Aware



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Publication details: Tuesday, July 9, 2024 1:07 PM

Page ID: 47080 - <https://www.eatonvance.com/tax-election.php>