

Navigating 2024: Politics, Policies and Portfolios

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Over the next year, election uncertainty will likely spur client concerns about volatility and possible tax legislation. As a leader in tax-managed investing, we can help you keep them well informed and positioned throughout the cycle and beyond.

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Navigating the 2024 Election

Webinar series featuring Strategas' Dan Clifton, who leads the #1 ranked Washington policy research team on Wall Street*

Live Event Dates

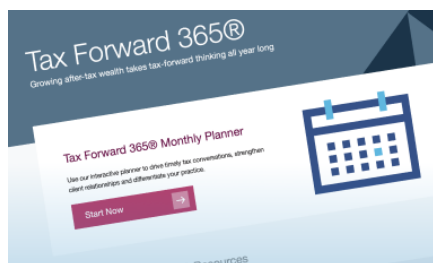
- December 12, 2023: Pre-Iowa Caucuses
- February 27, 2024: Pre-Super Tuesday
- May 21, 2024: Pre-Conventions
- September 10, 2024: Pre-Election
- November 19, 2024: Post-Election

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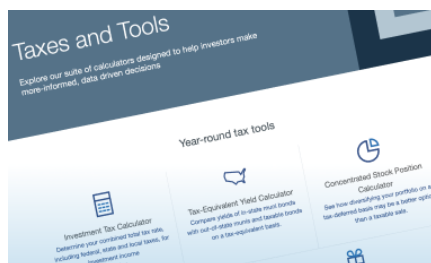
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Investment Tax Center

Year-round planning resources, strategies and tools to help you maximize your clients' after-tax growth potential.

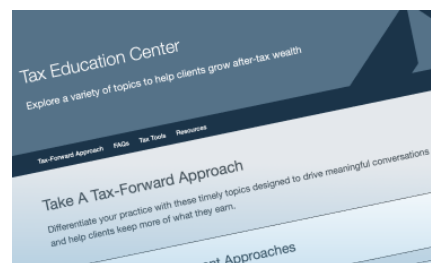
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Interactive Tax Tools

Suite of calculators that show clients how taxes impact their investments and opportunities for greater tax efficiency.

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Taxes

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"The finance ministers of Brazil and France have called for a tax on U.S. dollar billionaires of at least 2% of their wealth each year, hoping to shore up \$250 billion to combat poverty, hunger and climate change."

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May 15, 2024

"The one thing we know for certain is that tax laws are likely to change to help lower the national debt."

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*Institutional Investor, 2022

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Publication details: Thursday, April 25, 2024 8:51 AM

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