Navigating 2024: Politics, Policies and Portfolios

Follow the leader in tax-managed investing

Prepare for Any Result

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.

SPOTLIGHT STRATEGIES

Personalize and Optimize Tax Efficiency

Powered by Parametric

Custom Core®

An innovative direct indexing strategy that allows clients to build customized portfolios that feature continuous, active tax management.

LEARN MORE

Powered by Parametric

Fixed Income

A full suite of customizable laddered, managed and responsible solutions to help clients navigate complex markets and improve after-tax performance.

LEARN MORE

U.S. Charitable Gift Trust®

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

LEARN MORE

LATEST INSIGHTS

Parametric Blog

Gain unique perspectives on the latest tax-managed investing topics, tax policy dynamics and potential portfolio solutions.

Advisory Blog

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

Coach's Corner

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

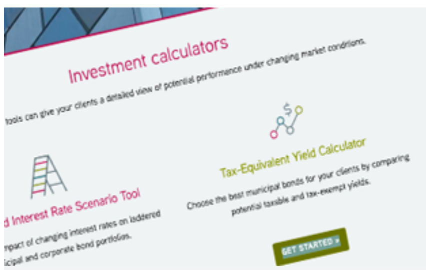
RESOURCES

Plan and Prepare Tax Aware

Investment Tax Center

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

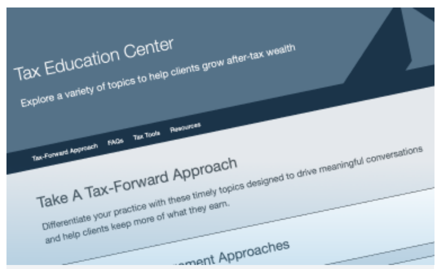
EXPLORE



Parametric Tax Tools

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

ACCESS



Tax Education Center

Topical, multimedia resources designed to help drive after-tax client conversations and differentiate your practice.

VISIT

Dedicated Advisor Support

Call us at **800-836-2414** for more information about our tax-managed investing expertise, resources and strategies.

*Institutional Investor, 2022

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

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