



Tax Information

2024 Tax Information

Rates, Schedules and Contribution Limits

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Q&A: Capital gains distributions

Information on capital gains and how they are distributed.

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Internal Revenue Service Form 8937

Report of Organizational Actions Affecting Basis of Securities

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2023 Tax Form Mailing Information

If you'd like to receive your tax forms via electronic delivery instead of by mail, please log into your account and enroll in E-Delivery. You will be notified by e-mail once your tax form(s) are ready to be downloaded.

Retirement Forms (1099-R)	Mail by January 31.
Non-Retirement Forms (1099-DIV, 1099-B)	Mail by February 15.
Holders of both retirement and non-retirement accounts	Will receive forms in separate packages.
Accounts with less than \$10.00 of reportable income	May not receive a tax form.
Tax forms for closed-end funds	Are issued by your brokerage firm. If you have any questions with regard to your closed-end fund tax form, please contact your financial advisor.

- [Eaton Vance 2023 Tax Guide](#)
- [2023 Open-End Funds Tax Supplement](#): Get income by state, tax-exempt income and other fund-specific tax information
- [2023 Closed-End Funds Tax Supplement](#)
- [Eaton Vance 2023 Open-End Funds Distribution Summary](#) 
- [Eaton Vance 2023 Closed-End Distribution Summary](#)

Prior Year Tax Guides & Information

The following information may be helpful for you and your tax advisor in preparing or revising prior year tax returns. This information is not intended as tax advice. Please contact your tax advisor with any questions.

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One Post Office Square
Boston, MA 02110

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