
TAX FORWARD ■ 365®

Employ Tax Management Strategies

Left unchecked, taxes can erode portfolio returns, diminish disposable income and impact wealth longevity. That's what makes tax-managed investing an important part of a sound financial plan.

How we can help

[TOOLS & CALCULATORS](#)[SPOTLIGHT STRATEGIES](#)[ACTIONABLE INSIGHTS](#)[ADVISOR RESOURCES](#)

TOOLS & CALCULATORS

Show clients how laddered portfolios may perform in different interest rate environments. For laddered municipal bond portfolios, the calculator also indicates the potential value of systematic tax-loss harvesting in a rising interest rate environment.

[LADDERED INVESTING INTEREST RATE SCENARIO CALCULATOR](#)[ACCESS MORE TAX FORWARD TOOLS](#)

SPOTLIGHT STRATEGIES

Parametric makes it easy for you to deliver tax- and risk managed portfolios tailored to your clients' needs, all in a simple, scalable way.

Learn about Parametric Custom Core portfolios.

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ACTIONABLE INSIGHTS

Focus and reinforce your client conversations with practical, relevant commentary.

Helping Clients Keep Their Earnings with Tax-Managed Core-Satellite Portfolios

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What Is Tax Management?

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ADVISOR RESOURCES

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Muni market Flash Update
with Nisha Patel, CFA

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with a proven leader:
Parametric Custom Core® delivers

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Parametric TABS Municipal Ladders:
Year-round tax-loss harvesting elevates
after-tax return potential

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[Calvert Funds](#)

[Separately Managed
Accounts](#)

[Closed-End Funds and
Term Trusts](#)

Insights

[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](#)

[Mutual Funds & Abandoned
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

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