Tax Management Center

Tax-managed investing solutions
Eaton Vance uses a variety of tax management techniques and offers specialized strategies and resources to help maximize after-tax wealth.

Partner with a leader in tax-managed investing

Experience
Year-round tax-forward thinking has helped advisors and their clients maximize after-tax wealth for over 50 years

Strategies
Comprehensive suite of tax-managed equity, fixed income and ESG-focused strategies

Support
Tax-forward tools, insights and resources to help investors grow and preserve after-tax wealth

Leverage the strength of our brands
Parametric uses a scientific approach to build customized portfolios with targeted exposures that focus on controlling costs and taxes.

Tax expertise, all year long

Growing after-tax wealth takes tax-forward thinking. Explore our entire suite of real-time insights, interactive tools and tax-efficient solutions.
Tools for tax-forward planning

Use our interactive tools to help your clients grow and preserve after-tax wealth by better understanding the investment taxes they pay today.

EXPLORE TAX TOOLS

Look to a leader in tax-efficient investing solutions

RECENT INSIGHTS

Charitable Giving | Taxes
Pooled Income Funds: How to Seize Potential Opportunity for a Higher Deduction This Year
November 6, 2023

"PIFs are looking at the highest annual average Section 7520 rate from the prior three years, but these rates may change again. What we do know for certain is that the rates will be higher, and there is value in the deduction that is available by contributing to a PIF this year."

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Charitable Giving | Taxes
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July 10, 2023

"There are three wealth transfer ideas that should be considered before the expanded TCJA expires on December 31, 2025."

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