

# 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

Parametric uses a scientific approach to build customized portfolios with targeted exposures that focus on controlling costs and taxes.

[LEARN MORE ABOUT PARAMETRIC TAX  
MANAGEMENT](#)

## 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.

TAX FORWARD ■ 365®

[EXPLORE TAX TOOLS](#)

## Look to a leader in tax-efficient investing solutions

### RECENT INSIGHTS

#### Taxes

[Should the world's richest taxpayers pay more to combat climate change, poverty?](#)

May 6, 2024

"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."

[READ MORE](#)

#### [Elections](#) | Taxes

[Bigger Bite of Corporate Taxes Would Sting Beyond Businesses' Bottom Lines](#)

April 9, 2024

"The fiscal year (FY) 2025 budget reinvigorates efforts to increase the U.S. corporate income tax rate from 21% to 28%, and includes provisions to hike the corporate alternative minimum tax (CAMT) from 15% to 21%, and to raise the corporate stock repurchase excise tax from 1% to 4%."

[READ MORE](#)

Ready to enhance your tax management practice?

[CONTACT US](#)

# Explore more Eaton Vance investing strategies

## Customized Investing Center

Flexible solutions from the leader in SMA investing

[VISIT CUSTOMIZED INVESTING CENTER](#)

## Responsible Investing Center

Diverse approaches for ESG-focused investors

[VISIT RESPONSIBLE INVESTING CENTER](#)



### HEADQUARTERS

One Post Office Square  
Boston, MA 02110

### Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[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 & Unclaimed  
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#) | [Terms & Conditions](#) | [Careers](#) | [Contact](#) | [Investor Account Access](#) | [Morgan Stanley Investment Management Terms of Use](#)

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**, the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). For **closed-end funds**, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or [download a copy here](#).

Before purchasing any **variable product**, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision. The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved.

Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

*Publication details: Thursday, May 9, 2024 6:08 AM*

*Page ID: 38279 - <https://www.eatonvance.com/tax-management.php>*