

PRODUCT FINDER

**WEALTH STRATEGIES** 

INVESTMENTS

INSIGHTS

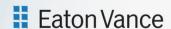
TAXES AND TOOLS

< Back to overview</p>

**Eaton Vance Tax Education Center** 

# WATCH | Year-Round Tax Planning, Simplified

2 minutes



# Year-Round Tax Planning, Simplified

Left unchecked, taxes can erode portfolio returns, diminish disposable income, and impact wealth longevity. That's why it's important to think ahead when it comes to tax planning well beyond Q4 and tax day. Being tax forward year-round allows you to help your clients minimize their tax exposures, keep their wealth plans on track and proactively generate more value.

A comprehensive investment plan can help improve after-tax outcomes by coordinating asset allocation with asset location. For example, early in the year is an optimal time to discuss the types of equity awards clients have so you can build and execute a tax-efficient strategy for these assets. Mid-year, be the catalyst for planning conversations to evaluate this year's tax reality and identify adjustments to help improve next year's tax outcome, including the potential impact of tax law changes. In late summer, review your clients' expected charitable donations to give you time to implement tax-smart strategies for their gifts, and don't forget the importance of year-round tax loss harvesting to help clients offset gains with losses.

Consider mapping out an action plan to start these key conversations with your clients and prospects. Here's a preview of monthly themes you can focus on.

Take a few minutes to explore the Eaton Vance Tax Education Center at EatonVance.com/TaxEdCenter for more useful resources to help you meet a variety of tax-forward investing needs.

#### Disclosure

Tax-loss harvest transactions aren't beneficial in a retirement account because the losses generated in a tax-deferred account cannot be deducted.

The Firm does not provide tax advice. The tax information contained herein is general and is not exhaustive by nature. Tax laws are complex and subject to change. Investors should always consult their own legal or tax professional for information concerning their individual situation.

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational







**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

<u>Events</u>Content for Investment Professionals

The Advisor Institute

## Taxes & Tools

**Investment Tax Center** 

Tax Information

Investment Tax Calculator

Laddered Investing Interest

Rate Scenario Tool

Concentrated Stock

Position Calculator

<u>Tax-Equivalent Yield</u> Calculator

### Resources

Forms & E-Delivery

Mutual Funds & Unclaimed

<u>Property</u>

**DST Vision** 

Active Advisor

Corporate Filings

Annual Reports

Press Releases

**Diversity and Inclusion** 

Accessibility	Business Continuity		Privacy & Cookies	Your Privacy Choices 🕢 🗴	Terms & Conditions	<u>Careers</u>	<u>Contact</u>
Investor Account Access		<u>Morgan</u>	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.

뎎 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 <u>download a copy here</u>. 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 <u>download a copy here</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or download a copy <u>here</u>.

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 <u>FINRA</u> / <u>SIPC</u>. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:49 AM

Page ID: 42127 - https://www.eatonvance.com/watch-tax-ed-center.php