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Eaton Vance Tax Education Center

WATCH | Three Ways to Start the Tax Conversation

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Three Ways to Start the Tax Conversation

Taxes are always a concern for sophisticated investors. As a tax-aware advisor, here are a few questions to help start the tax conversation and deepen your client relationships.

Which do you think detracts more from investment performance: fees or taxes?

Many clients believe high asset management or advisory fees are the biggest drain on investment returns, but the reality is that in many cases, taxes can reduce investing gains more than any other cost, and they can be the easiest cost to reduce.

Are you aware of how much taxes impact your investment returns each year?

Capital gains taxes can have a substantial impact on portfolio returns. Introduce your clients to the concept of after-tax returns and how, through tax-aware investing, you can provide a year-round approach that helps them keep more of what they earn.

Would you like to reduce the amount you pay in investment taxes each year?

For example, in a taxable portfolio, you can offer tax-managed services like tax loss harvesting which you can utilize all year long on their behalf.

Set yourself apart from other financial advisors by offering tax-forward investment strategies to your clients. When you ask the right questions, you'll be able to establish yourself as a valuable resource who can help them maximize their after-tax returns.

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.

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