



# Wealth Strategies Overview

Look to Eaton Vance for solutions to your clients' most significant investment challenges.

## Customized portfolios

One-of-a-kind portfolios designed to help HNW clients pursue their financial and philanthropic goals

## Tax management

Strategies to help maximize after-tax wealth

## Specialized strategies

Strategies designed to minimize taxes, manage volatility, enhance total return or generate income

Explore our content centers for in-depth information on the topics that matter most to HNW investors.

## [Customized Investing Center](#) >

Eaton Vance offers a wide range of customizable SMAs across a range of traditional equity, fixed income, ESG-focused, and alternative strategies

## [Tax Management Center](#) >

Helping investors maximize after-tax returns

## [Responsible Investing Center](#) >

Diverse approaches for socially minded investors

## [Concentrated Stock Center](#) >

Portfolio strategies for reducing risk

## [High-Net-Worth Investing Center](#) >

Customizable planning for the unique demands that affluence brings

## We understand objectives for high-net-worth investors

- ✓ Tax Efficiency
- ✓ In-kind funding\*
- ✓ Appreciated/concentrated stock
- ✓ Diversification
- ✓ Steady income
- ✓ Long-term growth
- ✓ Responsible investing

\*In-kind funding refers to using assets or securities to fund a strategy instead of cash.

# INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industry-leading customization and tax management solutions.

|                                              |                                                       |                                             |                                          |                                           |                                   |
|----------------------------------------------|-------------------------------------------------------|---------------------------------------------|------------------------------------------|-------------------------------------------|-----------------------------------|
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|----------------------------------------------|-------------------------------------------------------|---------------------------------------------|------------------------------------------|-------------------------------------------|-----------------------------------|

Questions about how Eaton Vance can assist with wealth strategies?

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