



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.

HIGH-CONVICTION EQUITIES	ACTIVE FIXED INCOME AND LIQUIDITY	ALTERNATIVE INVESTMENTS	CUSTOMIZED SOLUTIONS	SUSTAINABLE INVESTING	TAX SOLUTIONS
--	---	---	--	---	-----------------------------------

Questions about how Eaton Vance can assist with wealth strategies?

[CONTACT US](#)



[in](#)[twitter](#)[email](#)[facebook](#)



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](#)[Investor Account Access](#)

[Terms & Conditions](#)[Careers](#)[Contact](#)[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.

 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: 38588 - <https://www.eatonvance.com/wealth-strategies-overview.php>