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# Working With the Wealthy

Differentiate your capabilities in conversations with high-net-worth clients

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## FEATURED INSIGHT

### Incentive Compensation Guide


Compare various types of equity compensation

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## FEATURED VIDEO

### Run Better First Meetings With Wealth Inheritors

Ask wealth inheritors these three questions in a first meeting to understand their expectations. (1:37)

 Eaton Vance

ADVISOR INSTITUTE

Run Better  First Meetings With Wealth Inheritors



## Resources

Differentiate your practice with these timely topics designed to drive meaningful conversations and help clients keep more of what they earn

## Investment Concentration: 3 Questions to Ask

Asking the right questions can help start a conversation about diversification

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## Tax Planning for Life Events

Know the impact taxes have by creating a personalized plan for your clients that grows with them as their lives evolve

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Innovative solutions and tools for HNW planning

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### Customized Investing Center

Flexible solutions from the leader in SMA investing

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## Coach's Corner Blog

Commentary to help you elevate the success of your practice

Working with the Wealthy

[Prepare Your Clients for What Happens After an IPO](#)

By: [Holly Swan](#) | September 27, 2023

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