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[**Heirs of high earners must wrangle new tax laws, as massive generational wealth transfer looms**](#)

August 26, 2024

Bracing for the largest generational wealth transfer, the Internal Revenue Service (IRS) has raised the age at which workers must begin withdrawing funds from their qualified retirement accounts. The final rules (TD 10001; RIN:1545-BP82), released last month, amend the SECURE Act 2.0 permitting account holders to maintain 401(k), 403(b) and individual retirement account savings beyond the previous age limit of 70½ while eschewing hefty excise taxes punishing late withdrawal of those assets. The IRS also finalized new rules for non-spouse beneficiaries who inherit from original depositors who died in 2020 or later.



Eaton Vance on Washington

OUR EXPERTS

Across Eaton Vance, our people are experienced and accessible, bringing their distinct viewpoints and a personal touch to every relationship.



Marshall Stocker, Ph.D., CFA

Co-Director of Emerging Markets,
Portfolio Manager

Marshall Stocker is a vice president of Eaton Vance Management, co-director of emerging markets and portfolio manager on Eaton Vance's emerging markets team. He is responsible for co-leading the emerging markets team with investment professionals based in Boston, Washington, D.C., London and Singapore, as well as for buy and sell decisions, portfolio construction and risk management for assets in emerging and frontier markets. He joined Eaton Vance in 2013. [Download Full Bio](#)



Vishal Khanduja, CFA

Director of Investment Grade Fixed-
Income Portfolio Management and
Trading

Vishal Khanduja is a vice president of Eaton Vance Management and director of investment grade fixed income (IGFI) portfolio management and trading. He leads the Calvert/Core strategies and is responsible for buy and sell decisions and portfolio construction for those strategies. He joined Eaton Vance in 2016. [Download Full Bio](#)



Jeffrey Mueller

Co-Director High Yield Bonds
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August 26, 2024

KEY TAKEAWAYS



Aaron Dunn, CFA
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Co-Head of Value
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[HIGH QUALITY EQUITY](#)

Focus on time in the market, not timing the market

By: [Global Opportunity](#) | August 23, 2024

Recent market volatility, driven by macroeconomic and geopolitical uncertainty, has raised questions about the near-term prospects for equity returns. Will the sell-off be short-lived? Or rather, accelerate into a market correction?

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Year of (non) elections

By: [Emerging Markets Debt](#) | August 21, 2024

Boston - Coming into the year, all eyes were on countries with elections including India and Taiwan in Asia. But the surprise has been political change in countries without elections. Sheikh Hasina was forced out as PM of Bangladesh by protesters and fled to India. Vietnam's former Minister of Public Security was able to attain both the Secretary General position and Presidency after a series of maneuverings. Thailand's Prime Minister was removed by a Constitutional Court ruling. What do these episodes say about the pitfalls of weakening economic institutions in emerging markets?

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