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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

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](#)



Jeffrey Mueller

Co-Director High Yield Bonds
Portfolio Manager

Jeffrey Mueller is a vice president of Eaton Vance Advisers International Ltd. and a portfolio manager on Eaton Vance's high-yield team. He is responsible for buy and sell decisions, portfolio construction and risk management for the firm's high-yield and multi-asset credit strategies. He leads investment management and credit research for all non-U.S. high-yield opportunities. Jeff will become co-director of high-yield investments effective January 1, 2020. He joined Eaton Vance in 2015. [Download Full Bio](#)



Vishal Khanduja, CFA

Director of Investment Grade Fixed-
Income Portfolio Management and
Trading

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August 26, 2024

KEY TAKEAWAYS



Aaron Dunn, CFA
Co-Head of Value
Equity
Portfolio Manager
Eaton Vance Equity



Bradley Galko, CFA
Co-Head of Value
Equity
Portfolio Manager
Eaton Vance Equity

[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?

"It is important to remember that following a 5% decline in global equities since 1999 (based on the MSCI ACWI Index), subsequent median returns have been 11% over the next 12 months with positive returns two-thirds of the time!"

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[EMERGING MARKETS DEBT](#) | [INTERNATIONAL/GLOBAL](#)

[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?

"Political analysis should focus on but not be limited to elections. The big stories in Asia this year have been elsewhere."

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