



You've got goals. We've got solutions.

Forward-thinking investors have more advanced needs. We provide a diverse selection of strategies and personalized wealth management solutions to meet them.

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ASSET CLASS

Income

- All
- Taxable Income
- Tax Advantaged/Municipal Income
- Municipal Income - National
- Multi-Asset
- Floating-Rate Loan
- Multi-Sector
- Municipal Income - State

Equity/Hybrid

- All
- Equity Income
- Multi-Asset
- Dividend Income
- Option Income
- Domestic Equity
- Global/International Equity
- Tax-Managed Equity
- Equity/Hybrid

Alternative

- All
- Absolute Return
- Alternatives

Term Trusts



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- NextShares®
- Closed-End Funds & Term Trusts

AFFILIATE

- All
- Atlanta Capital
- Eaton Vance
- Hexavest
- Parametric
- Calvert

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SEPARATELY MANAGED PORTFOLIOS

These highly customized portfolios offer a range of solutions to address the specific goals of high-net worth investors.

➤ Fixed Income

➤ Equity

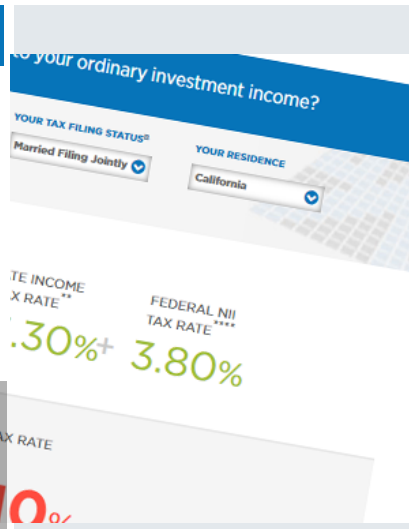
➤ Responsible Investing

➤ Alternative

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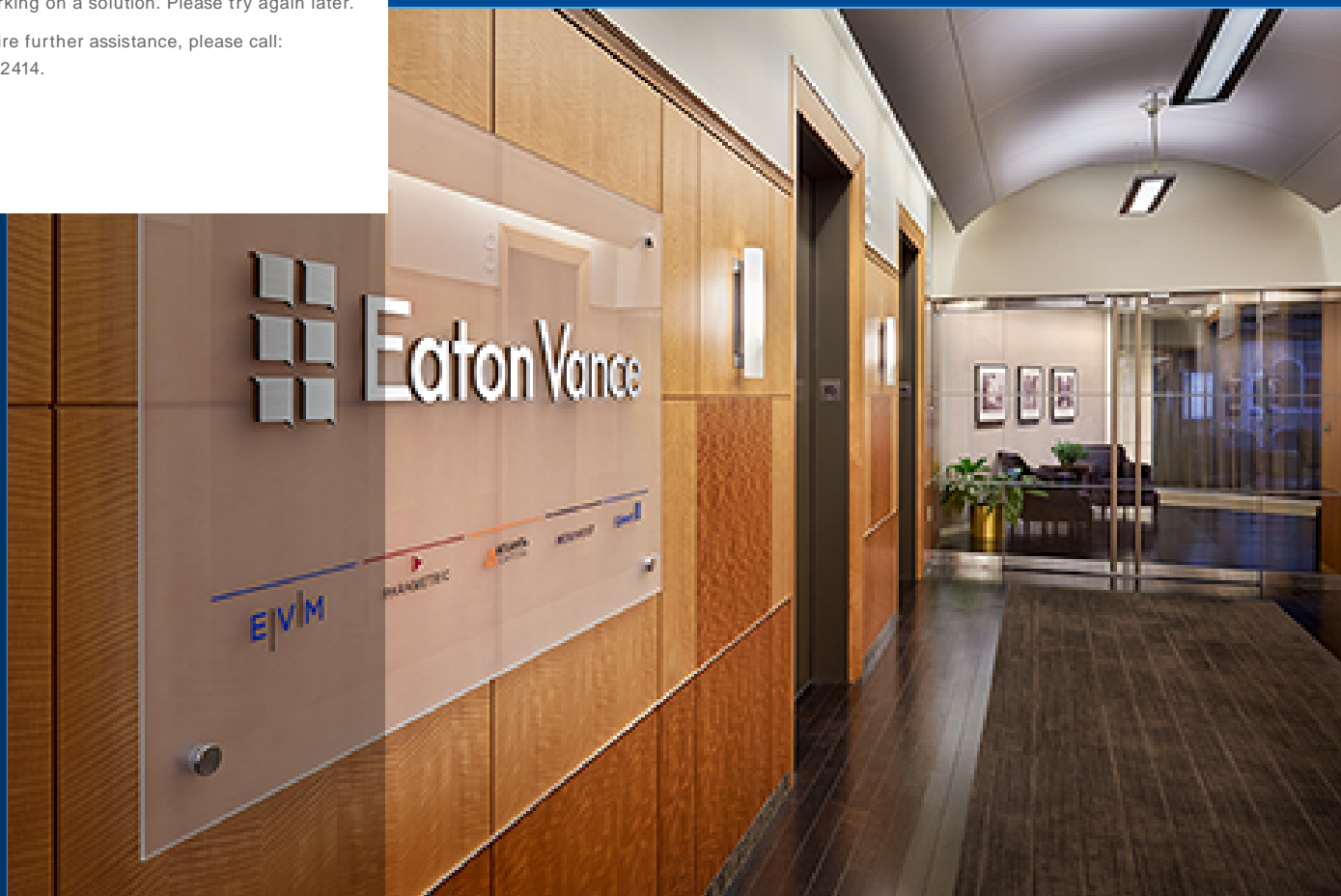




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Two International Place
Boston, MA 02110

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