

# High-Net-Worth Investing Center

## When traditional strategies are not enough

With affluence comes unique demands, and Eaton Vance has customizable strategies to help meet the demands of your most discerning clients.

Look to Eaton Vance for solutions to your clients' most significant investment challenges.

### Customization

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

## Innovative solutions for HNW investors

Eaton Vance and its brands offer a range of investing and charitable giving solutions.

Unique High-Net-Worth (HNW) Solutions\*



HNW Capabilities	HNW Priorities					
	Concentrated Stock	Volatility Management	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing
<b>Parametric Custom Core® ⓘ</b> <a href="#">Custom, tax-managed equity portfolios</a>	●		●		●	●
<b>Parametric Option Overlay Strategies ⓘ</b> <a href="#">Seek to enhance returns on existing assets</a>	●	●		●		
<b>Parametric TABS Managed Municipals ⓘ</b> <a href="#">Pursue tax-exempt income and capital preservation</a>			●	●		●
<b>Parametric TABS Municipal Ladders ⓘ</b> <a href="#">Seek to minimize interest-rate risk and provide tax-exempt income</a>			●	●		●
<b>Parametric Corporate Ladders ⓘ</b> <a href="#">Pursue income and capital preservation</a>			●	●		●
<b>Calvert Research and Management ⓘ</b> <a href="#">Research-based Responsible Investing</a>				●	●	●

## Charitable giving solutions with the U.S. Charitable Gift Trust®



HNW Capabilities	HNW Priorities					
	Appreciated/ Concentrated Stock	Volatility Reduction	Tax Efficiency	Steady Income	Long-term Growth	Responsible Investing
<b>U.S. Legacy Income Trusts® ⓘ</b> <a href="#">Tax-advantaged income for life   Legacy of charitable giving</a>	●		●	●	●	
<b>Donor-Advised Funds ⓘ</b> <a href="#">Immediate tax deduction. Flexible giving options.</a>	●		●		●	●

# Tools for high-net-worth planning

Take your clients to the next level with our suite of online calculators.



## Investment Tax Calculator

[LAUNCH TOOL](#)

## Charitable Income Tax Deduction Calculator

[LAUNCH TOOL](#)

## Concentrated Stock Position Calculator

[LAUNCH TOOL](#)

## Laddered Investing Interest Rate Scenario Tool

[LAUNCH TOOL](#)

Let's talk about your HNW clients' objectives and needs.

[CONTACT US](#)

## INVESTMENT CAPABILITIES

We offer a broad range of strategies, deep experience in sustainable investing and industry-leading

customization and tax management solutions.

<a href="#">HIGH-CONVICTION EQUITIES</a>	<a href="#">ACTIVE FIXED INCOME AND LIQUIDITY</a>	<a href="#">ALTERNATIVE INVESTMENTS</a>	<a href="#">CUSTOMIZED SOLUTIONS</a>	<a href="#">SUSTAINABLE INVESTING</a>	<a href="#">TAX SOLUTIONS</a>
--	---	---	--	---	-----------------------------------

RECENT INSIGHTS

[Attracting Clients](#) | [Bridge to Referrals](#) | **Chasing Positivity**  
[Seize Opportunities Presented by Volatility with a Thesis](#)  
By: [David Richman](#) | April 22, 2024

[READ MORE](#)

**Chasing Positivity**  
[Turn Reflections into New Year's Actions](#)  
By: [David Richman](#) | December 19, 2023

[READ MORE](#)

Explore more Eaton Vance investing strategies

Customized Investing Center

Flexible solutions from the leader in SMA investing

[VISIT CUSTOMIZED INVESTING CENTER](#)

Tax Management Center

Help investors keep more of what they earn

[VISIT TAX MANAGEMENT CENTER](#)

Advisory services offered by Eaton Vance Management, Parametric Portfolio Associates LLC and Calvert Research and Management, SEC-registered investment advisers and affiliates of Eaton Vance.

\*Opinions and estimates offered constitute our judgment and are subject to change without notice, as are statements of financial market trends, which are based on current market conditions. This information is not intended as an offer or solicitation for the purchase or sale of any financial instrument. The views and strategies described may not be suitable for all investors.

Investing involves risk, including the risk of loss. There generally is limited public information about municipal issuers. As interest rates rise, the value of certain income investments is likely to decline. Investments in debt instruments may be affected by changes in the creditworthiness of the issuer and are subject to the risk of nonpayment of principal and interest. The value of income securities also may decline because of real or perceived concerns about the issuer's ability to make principal and interest payments. The value of equity securities is sensitive to stock market volatility. Investing primarily in responsible investments carries the risk that, under certain market conditions, a strategy may under-perform others that do not utilize a responsible investment strategy. In evaluating a company, the Advisor is dependent upon information and data that may be incomplete, inaccurate or unavailable, which could cause the Advisor to incorrectly assess a company's ESG performance. Option Strategy Risk – The effectiveness of an option strategy depends on a general imbalance of natural buyers over natural sellers of index options. This imbalance could decrease or be eliminated, which could have an adverse effect on a client portfolio. Taxes - Market conditions may limit the ability to generate tax losses or to generate dividend income taxed at favorable tax rates. The ability to utilize various tax-managed techniques may be curtailed or eliminated in the future by tax legislation or regulation. Investing entails risks, and there can be no assurance that Eaton Vance (and its affiliates) will achieve profits or avoid incurring losses.



**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 & Abandoned  
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

[Accessibility](#) | [Business Continuity](#) | [Privacy & Cookies](#) | [Your Privacy Choices](#) | [Terms & Conditions](#) | [Careers](#) | [Contact](#) |  
[Investor Account Access](#) | [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.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 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: Tuesday, March 5, 2024 10:48 AM*

*Page ID: 38587 - <https://www.eatonvance.com/high-net-worth.php>*