

< Back to The Advisor Institute

Coach's Corner

Our latest commentary to help you elevate the success of your practice



Disclosure

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.

LATEST INSIGHTS

Attracting Clients | Bridge to Referrals
Leverage The BEAT to Spring
Client Conversations Forward

By: David Richman | March 26, 2024

READ THE BLOG POST

Working with the Wealthy

Five Tax-Aware Questions to Ask Before Major Wealth Events

By: Holly Swan | March 20, 2024

READ THE BLOG POST

Attracting Clients | Bridge to Referrals

Challenge Magnificent Seven Complacency with an Ism

By: David Richman | March 19, 2024

READ THE BLOG POST

Search our insights by topic category or author



After-Tax Advisor

Optimize and Maximize: Tax Planning for Major Life Events

By: Holly Swan | March 6, 2024

Life is full of significant moments that bring joy, change, and new responsibilities. You can bring value to your clients during these times by helping them navigate the income tax planning opportunities that accompany them.



After-Tax Advisor

Increase Interest in Split-Interest Giving for Tax Advantages

By: Holly Swan | February 27, 2024

These are uncertain times for taxes. The combination of the Tax Cuts and Jobs Act sunset and an upcoming election has <u>tax laws hanging in the balance</u>. Clients likely feel the uncertainty and wonder what they should do to prepare for different outcomes.

READ MORE ♥



Holly Swan
Executive Director
Advisor Institute

After-Tax Advisor

Tax Laws Hang in the Balance: Preparing Clients for a Potential Sunset

By: Holly Swan | February 16, 2024

Let's look past the typical 2024 election headlines and consider one issue that might not be in your election newsfeed—the possible sunset of the Tax Cuts and Jobs Act of 2017 (TCJA) at the end of 2025.

READ MORE ♥



Holly Swan
Executive Director
Advisor Institute

After-Tax Advisor | Working with the Wealthy
Incentive Compensation: Let the Tax Code Be Your Guide

By: Holly Swan | January 17, 2024

Many U.S. companies grant equity awards at year-end, and advisors come face-to-face with clients who might not know what their employer's stock is worth.

READ MORE ❤



Holly Swan
Executive Director
Advisor Institute

After-Tax Advisor

Start 2024 Strong by Being an After-Tax Advisor

By: Holly Swan | January 8, 2024

A financial advisor's success in today's highly competitive market is dependent on high-touch, personalized services that make wealthy investors' goals more attainable. The three tenets of The After-Tax Advisor are a guide to deliver the added planning value your clients are

READ MORE ♥



Holly Swan
Executive Director
Advisor Institute

After-Tax Advisor

To Itemize or Standardize? Help Clients Choose the Right Deduction

By: Holly Swan | December 28, 2023

Year-end is a great time for your clients to look at how their itemized versus standard deductions compare and determine if there are any changes they could make to optimize their tax outcomes.

READ MORE ♥



Holly Swan

Executive Director

Advisor Institute













HEADQUARTERSOne 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 XX 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 <u>download a copy here</u>. 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 <u>download a copy here</u>. To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, contact your financial advisor or <u>download a copy here</u>.

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 <u>FINRA</u> / <u>SIPC</u>. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:49 AM

Page ID: 4600 - https://www.eatonvance.com/advisor-institute-coachs-corner.php