



Concentrated Stock Center

Do you have concentrated stock positions?

If you have a stock that represents more than 20% of your portfolio, it may be time to diversify.

We offer a range of strategies to help diversify your concentrated stock in a tax-efficient manner.

In-kind transfers

Transition your existing stock in-kind to minimize tax consequences.

Variety of strategies

Access a specialized suite of investment strategies that allow for in-kind transfers.

Charitable options

Create a legacy of giving with tax-efficient charitable vehicles.

Get a better understanding of your holdings

Concentrated stock position calculator

Calculate the total amount of capital gains taxes you would pay if you sold your stock position today.

[USE THE TOOL](#)

Concentrated stock positions: Know the risks

When compared with broad market equity indexes, individual stocks have historically posted higher volatility and lower median performance than the stock market as a whole.

[DOWNLOAD](#)

Questions about how Eaton Vance can assist with wealth strategies?

[CONTACT US](#)

Explore more Eaton Vance investing strategies

Tax Management Center

Help investors keep more of what they earn

[VISIT TAX MANAGEMENT CENTER](#)

High-Net-Worth Investing Center

Customizable planning for the unique demands that affluence brings

[VISIT HNW INVESTING CENTER](#)



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: 38584 - <https://www.eatonvance.com/concentrated-stock-center.php>