

## A Deeper Dive

### Isms from our thought leaders

Your “isms” are those evergreen beliefs that frame your philosophy. Isms should be timeless, pithy soundbites that connect the dots to the work you do with your clients. Sharing these rules of thumb with clients can help them maintain clarity and perspective, unlock your differentiated brand and help you capture referable moments.

At the Advisor Institute, our goal is not to shape your opinion or provide investment advice, but rather to illustrate a variety of superb isms.



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## Volatility creates cherry-picking seasons

[Lewis R. Piantedosi](#)

Director of Growth Equity, Eaton Vance



[Yana S. Barton, CFA](#)

Portfolio Manager, Growth Team, Eaton Vance

*"Volatility creates a real opportunity for us to refocus our portfolio. We ask our team to take a look at what we own and what we don't and try to redirect the portfolio to where we see the best long-term reward-to-risk opportunities. It's really difficult to predict the macro. It's much easier for us to look out at the big picture and realize that even in difficult macro environments, certain companies can continue to grow. And that's when you get them on sale —so you take advantage of it."*

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## Markets would be uninteresting without uncertainty

[Edward J. Perkin, CFA](#)

Chief Equity Investment Officer, Eaton Vance

*"As an investor, you have to have a mindset that embraces uncertainty. As human beings, we crave certainty. We want things to be clear. We all wish we had a crystal ball. I think opportunity in investment markets comes from the fear that others have and the uncertainty about potential outcomes."*

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## Don't let your political views influence your investment decision-making

Bill Hackney, CFA

Senior Partner at Atlanta Capital Management

*"There's very little direct correlation between politics and the stock market. Public policy and politics can, in the long term, certainly affect the economy and the stock market, but it does so with a lag."*

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## No one should crave a periscope from the grave

Jeffrey L. Condon

Attorney & Author

*"Acting as a periscope from the grave, financial advisors play an integral role in helping their clients to anticipate problems that could surface after they have passed away. By understanding the unintended potential consequences of various estate planning decisions, you can counsel your clients appropriately. Then they will not need to crave a periscope from the grave, because they will have promoted harmony among their children and protected their inheritance from estate taxes or probate."*

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*Jeffrey Condon is not an employee of Eaton Vance.*

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Publication details: Monday, June 21, 2021 12:17 PM

Page ID: 4832 - <https://funds.eatonvance.com/deeper-dive.php>