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Investment Overview

- Managed for after-tax total return
 - Customizable Investment Solutions — Credit and Duration
 - Smart Beta + Active Management
 - Core Municipal Market Exposure
 - Alpha Added from TABS Security Selection
 - TABS Crossover Trade
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Portfolio Construction

- Quantitative approach to structuring portfolios
 - Structured to seek high risk-adjusted income
 - Portfolio optimized for after-tax total return
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Investment Team



Jim Evans, CFA, Director of
Tax-Advantaged Bond Strategies
(TABS)

35 years of industry
experience
10 years at Eaton Vance

BS, Cornell University



Brian Barney, CFA, Director of
Institutional Portfolio Strategies

17 years of industry
experience
10 years with Eaton Vance

BS, University of Virginia



Christopher Harshman, CFA, Vice
President and Portfolio Manager

16 years of industry
experience
10 years with Eaton Vance

BS, University of Florida
MBA, University of
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Devin Cooch, CFA, Vice President
and Portfolio Manager

11 years of industry
experience
10 years with Eaton Vance

BA, Bucknell University

Benchmark

- Bloomberg Barclays Managed Money Municipal Bond Index (7-20 Years)
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