

Investment Capabilities

Investment Resources

- We conduct independent research to construct high-conviction portfolios that are designed to meet long-term needs
- We work closely with Eaton Vance Management's Equity team, leveraging the insights of more than 30 fundamental sector analysts across market caps, styles and geographies
- Our fixed income strategies benefit from the broad scope of EVM's Global Fixed Income coverage with expertise in municipal and corporate bonds, floating rate, high yield and global debt
- Our comprehensive wealth management solutions benefit from our access to our affiliates: Parametric, Atlanta Capital, Calvert and Hexavest

Responsible Investing Capabilities

- Our Best Practices approach to Environmental, Social and Governance (ESG) and Responsible Investing allows us to leverage Eaton Vance's deep resources from Parametric and Calvert to create customized portfolios across asset classes

Additional Wealth Management Capabilities

- Tax-efficient portfolio migration
- Tax-deferred, low-cost stock diversification
- Private investments

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