

Financial Planning

Comprehensive Solutions

Eaton Vance Investment Counsel offers time-tested, sophisticated financial planning tools and analysis. We also offer peace of mind. When it comes to your financial security, we want to consider every detail. That is why we offer solutions in such areas as:

- Retirement
- Cash flow analysis
- Charitable strategies
- Insurance advice
- Deferred compensation
- Concentrated stock
- Stock options

Sophisticated Analytics

Our goal is to plan for your long- and short-term needs, while also building in a cushion for unanticipated events. In pursuit of these objectives, we apply highly developed analytics. Among them are:

- Techniques for estimating cash flow volatility
- Investment modeling to ensure retirement assets meet life expectancies
- Probability analysis
- Early detection monitoring of issues that might threaten your financial security

Keeping You Informed

- We provide clients with progress reports on investments through regular telephone conversations, periodic mailings and investment reviews.
- On a monthly basis, our clients receive an appraisal of their portfolio(s) that details investments at cost and current market value. Performance reports, transaction summaries and investment outlook commentaries may also be provided quarterly.
- Client meetings are scheduled as often as needed, with at least one annually. We begin with a review of the current investment objectives and specific policy guidelines by the Investment Counselor, followed by a discussion of the account's progress.
- We encourage clients to keep us informed of any change in circumstances that may warrant a revision in their investment objectives.

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