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Eaton Vance Announces Launch of Investment Tax Calculator

BOSTON, April 4, 2019 – Eaton Vance Corp. (NYSE: EV) announced today the launch of an easy-to-use Investment Tax Calculator with newly enhanced features and functionality to help U.S. individual taxpayers and their advisors make smarter investment decisions by better understanding the investment taxes they pay. Based on user inputs of income level, tax filing status and place of residence, the calculator determines the combined total tax rate – including federal, state and local taxes – that applies to an incremental dollar of the investor’s ordinary investment income, in-state and out-of-state municipal bond and U.S. Treasury interest income, qualified dividend income, net realized long-term and short-term capital gains, and qualified retirement plan withdrawals. The calculator also includes tools enabling investors and advisors to readily compare the after-tax income of different types of fixed income investments and to evaluate the tax consequences of selling concentrated stock positions, taking into account the investor’s individual tax circumstances. The Investment Tax Calculator is available to the general public on a free website accessible at eatonvance.com/mytaxrate.

“Our engagement with investors and financial advisors constantly reinforces the message that they need more information and better tools to help manage investment tax effects,” said Thomas E. Faust Jr., chairman and chief executive officer of Eaton Vance. “As a long-time leader in tax-managed investing through our Eaton Vance Management and Parametric subsidiaries, Eaton Vance is pleased to make the Investment Tax Calculator available to help guide informed investment decisions.”

About Eaton Vance

Eaton Vance Corp. (NYSE: EV) provides advanced investment strategies and wealth management solutions to forward-thinking investors around the world. Through principal investment affiliates Eaton Vance Management, Parametric, Atlanta Capital, Hexavest and Calvert, the Company offers a diversity of investment approaches, encompassing bottom-up and top-down fundamental active management, responsible investing, systematic investing and customized implementation of client-specified portfolio exposures. As of February 28, 2019, Eaton Vance had consolidated assets under management of \$452.6 billion. Exemplary service, timely innovation and attractive returns across market cycles have been hallmarks of Eaton Vance since 1924. For more information, visit eatonvance.com.

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Eaton Vance does not provide legal or tax advice. The output of the Investment Tax Calculator is for educational purposes only and should not be considered investment, legal or tax advice. It is intended for use by U.S. individual taxpayers resident in the 50 states or the District of Columbia, and is not applicable to trusts, estates, corporations or persons subject to special rules under federal, state or local income tax laws. The indicated tax treatment of investment income and gains applies to positions in securities held outside qualified retirement plans and other tax-deferred or tax-exempt investment vehicles. The output is general in nature and is not intended to serve as the primary or sole basis for investment or tax-planning decisions.

For more individualized information, you should consult your tax advisor or investment professional. You bear sole responsibility for any decisions you make based on the output of the Investment Tax Calculator. The calculator makes certain assumptions that may not apply to you. The calculator has many inherent limitations, and individual results may vary.

Before investing in a mutual fund, you should consider carefully the fund's investment objectives, risks, charges and expenses. This and other important information is contained in the fund's prospectus and summary prospectus, which can be obtained from a financial advisor. You should read the prospectus carefully before investing.

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