

at a glance» TAXES IN AMERICA CONFERENCE CALL SERIES



All investments involve risk including possible loss of principal.

Andy Friedman is not affiliated with Eaton Vance or Morgan Stanley Smith Barney.

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After a hard fought, historic campaign, a new president and administration took office and a new Congress convened, each one with its own agenda, each seeking to bring new initiatives to the American people. Among the most important topics to be considered are potential legislative changes affecting tax policy that are likely to occur in Washington over the coming years.

In an effort to keep you apprised of recent activities and potential opportunities, I would cordially like to invite you to dial in to a series of conference calls on **Taxes in America: Preparing for the New Reality**, sponsored by Eaton Vance Investment Managers. On a monthly basis for the remainder of 2009, we will be hearing from Andy Friedman (Covington & Burling, Senior Partner), Washington expert and one of the nation's most sought-after speakers on political and legislative developments and their likely effect on the government's tax, fiscal and retirement policies. Each month, Andy will focus on a topic relating to possible and moving legislation, and investment strategies to consider in light of these developments.

- **October 13, 2009 at 4:00pm ET**
Topic: Retirement Planning
What legislative changes might take place in Washington affecting retirement planning and what should you be doing to prepare for them?
- **November 2, 2009 at 4:00 pm ET**
Topic: The Roth IRA Conversion Opportunity
Beginning next year, everyone will be able to convert an IRA to a Roth IRA. Which clients should (and, importantly, which should not) take advantage of this conversion opportunity and how will the rules operate?
- **December 1, 2009 at 4:00 pm ET**
Topic: Gift and Estate Planning
Will the estate tax, in fact, disappear next year or will Congress act? What will the effect of any legislative action be on various gift and estate planning strategies, and how you should be preparing yourself?

Dial-in: (866) 502-2159 (toll free within the U.S.)