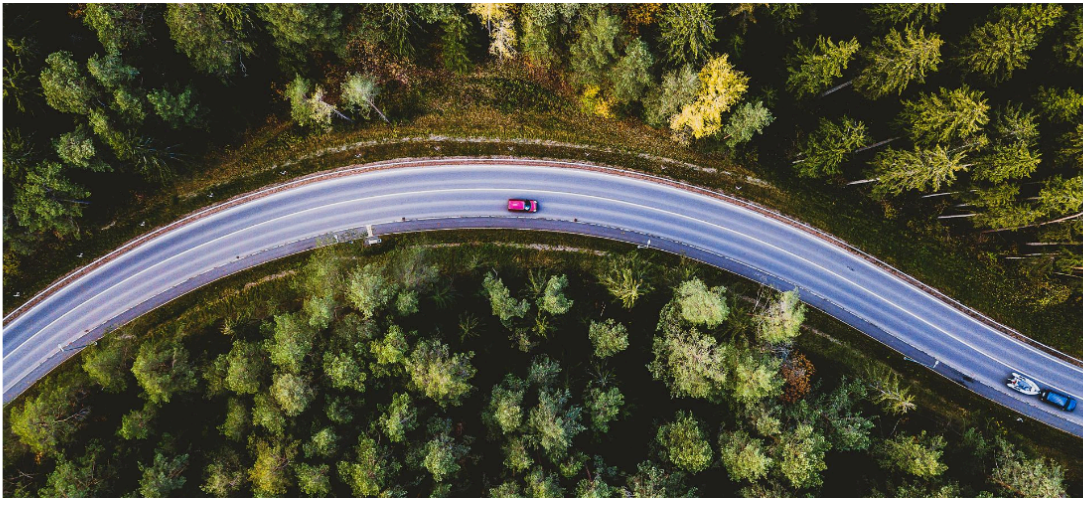


The Boston Center Group at Morgan Stanley



# Unlocking the Power of Direct Indexing

Tuesday, May 6th | 4:00 PM ET | [Zoom](#)

The Boston Center Group is excited to invite you to the next installment of our 2025 webinar series, featuring **Toebe Hinckle** for an insightful discussion on **Direct Indexing**.

In this webinar, we will discuss:

- What is direct indexing?
- What are some advantages of customization?
- Why is tax loss harvesting an important part of direct indexing?
- What clients and accounts is direct indexing best for?

This session is open to all—feel free to share this invitation with friends, family, and colleagues. We look forward to seeing you there!

If you have a specific question you would like to ask in advance, please email: [BCG@ms.com](mailto:BCG@ms.com).

[RSVP Here](#)

*Host:*



**Todd J. Mulligan, CFA, CFP®, CAIA**

*Senior Vice President, Financial Advisor  
Portfolio Management Director*

*Speaker:*



**Toebe Hinckle**

*Wealth Strategies Group  
Eaton Vance Distributors*

Toebe Hinckle is an executive director of Eaton Vance Distributors, Inc. He is a wealth strategy specialist in the Wealth Strategies Group, responsible for consulting with internal and external partners to craft security-level and portfolio-level solutions for wealthy investors. The group works with financial advisors and the firm's sales representatives to help educate and implement strategies such as customized separately managed accounts, tax-loss harvesting, concentrated stock solutions, charitable giving and options overlay. He joined Eaton Vance in 2011.

Toebe began his career in the investment management industry in 2001. Before joining Eaton Vance, he was affiliated with Clough Capital Partners and Natixis Global Associates.

Toebe earned a B.S. from The Pennsylvania State University.

## We hope that you can join us!



[Visit Our Website](#)

Pictured L to R: Todd Mulligan(Finacial Advisor),David Typermass (Financial Advisor),Jaclyn Claus (Registered Client Service Associate),Stephen Fitzmaurice (Financial Advisor),Yvette Sekyere-Abankwa(Portfolio Associate),Kyle Cox(Financial Advisor)

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Direct Indexing may adversely impact account performance. There is no guarantee that Direct indexing will produce the desired tax results. Morgan Stanley offers investment program services through a variety of investment programs, which are opened pursuant to written client agreements. Each program offers investment managers, funds and features that are not available in other programs; conversely, some investment managers, funds or investment strategies may be available in more than one program. Morgan Stanley's investment advisory programs may require a minimum asset level and, depending on a client's specific investment objectives and financial position, may not be appropriate for the client. Please see the applicable program disclosure document for more information, available at [www.morganstanley.com/ADV](http://www.morganstanley.com/ADV) or from your Financial Advisor.

If you engage in tax loss harvesting, you must also keep in mind the "wash sale" rules. Under these rules, if you purchase the same or substantially identical securities within 30 days before or after the sale of the securities that generated the loss, the loss will be disallowed. Tax-aware strategies seek to reduce capital gains. There is no guarantee that they will eliminate them.

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