RAYMOND JAMES

A quality tier of financial guidance

Uncover the sophisticated capabilities and elevated support of the Private Wealth team.

Finding the right professionals – the right partners – is essential to rising to the unique demands of wealth. You need a team that coordinates the insights and expertise of cross-disciplined wealth specialists. Through the Private Wealth team and my specialized insight as a financial professional, you'll have just that.

Steadfastly dedicated to your financial well-being, the Private Wealth team works closely with advisors to create strategies designed to help you reach your objectives and aspirations. Their seamless, coordinated approach to wealth management begins with a step-by-step process that helps you ask and answer key questions, a process developed and refined over more than 50 years of helping uniquely successful individuals and their families.

The Private Wealth team offers a comprehensive menu of personalized services and elevated support to assist you with all aspects of your financial strategy and investment plan. Your investment management options will be explored, giving you the freedom to engage a broad selection of Private Wealth offerings, ranging from separately managed accounts and structured products to fixed income and more. If you're seeking estate, business succession or philanthropic planning rooted in a thoughtful, tailored approach, Private Wealth specialists can guide you through each step of creating a plan for your unique family objectives – from delivering estate tax mitigation ideas to implementing philanthropic giving strategies, including donor advised funds and family foundations.

SOPHISTICATED WEALTH MANAGEMENT ROOTED IN A PERSONAL APPROACH

In addition to leveraging a full breadth of resources and capabilities, the Private Wealth team shares the firm's celebrated culture of independence, granting them freedom to offer objective advice and make product recommendations without the pressure to promote specific services. And like the firm and its advisors, the team makes your financial well-being its highest priority.

The Private Wealth team of trusted specialists includes a team of portfolio consultants who will be ready to assist you through holistic portfolio reviews and recommendations, including access to an array of institutional quality strategies and private investments. Whether you're seeking sophisticated alternative investments or holistic cash management and lending options, the Private Wealth team's client-focused approach will put your needs and objectives at the forefront of everything they do.

AN EXCLUSIVE OPPORTUNITY

The Private Wealth team delivers superior service to clients through the By Invitation Only program. An exclusive opportunity to visit the firm's international headquarters in St. Petersburg, Florida, the By Invitation Only program invites clients like you to enjoy thought-provoking meetings with firmwide specialists – all unfolding through a customized agenda designed to meet your unique objectives.

ESTATE & CHARITABLE PLANNING

- Trust services
- Philanthropic planning & administration
- Estate planning
- Business succession

FAMILY GOVERNANCE

- Legacy planning
- Health and wellness
- Caregiving

INVESTMENT MANAGEMENT

- Investment strategy
- Asset allocation
- Comprehensive investment products

CASH MANAGEMENT & LENDING

- Bill pay and budgeting
- Private banking

RISK MANAGEMENT ADMINISTRATION

- Insurance
- Security
- Document & record management

Let's discuss how the Private Wealth team can provide you with the high-touch consulting and sophisticated planning you expect and deserve.

RAYMOND JAMES®

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