

THE RAYMOND JAMES WEALTH MANAGER JOURNEY

EXPLORING RAYMOND JAMES



Our Business Development Team will meet with you to fully understand your needs, discuss your options and help you to decide whether this is the right step for you.



We make sure that we fully understand your circumstances and your driving factors



We will discuss the potential benefits to you, as well as considerations around the risks involved



We will show you real-life examples of how it works

MAKING YOUR DECISION



We will equip you with all the tools you need, to assist in your decision making process. We can assist with documenting your investment proposition, technology and marketing planning and support.



How we can help you with your decision-making process:

Questions to consider:

- Is now the right time for you?
- Are you the right person?
- Have you considered the investment you would need to make?



Discussing the details, conducting stress tests, and outlining how we can help support you with your personalised plan

WORKING IN PARTNERSHIP



Once you join us, the Relationship Management Team will be there to help make your transition to Raymond James smooth and seamless. We will work together to address your needs and goals throughout the process. Regular engagement will ensure that we get you up and running as quickly as possible.

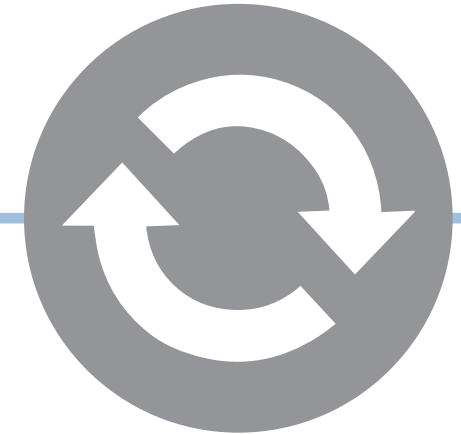


You can depend on us to be with you every step of the way, providing clarity and detailed progress updates



Engagement with us will be ongoing, and we will work through your personalised plan, helping you to meet your milestones to achieve success

HELPING YOU GROW



Working together to help you meet longer-term goals and continued business growth. We will introduce you to ideas and concepts that will help you deliver outstanding solutions to your clients and continue to grow your practice.



We work with you to provide pro-active reviews, idea generation and all the support needed to ensure the continued success of your business



Our Practice Intelligence programme provides a simple, step-by-step approach to optimising your practice. When you want to grow your business, this is where you start.