

The Vaughn / McLaughlin Team of Raymond James & Associates, Inc.
Your Trusted Family Financial Planners of the Nature Coast

Value Proposition:

We deliver a comprehensive wealth management plan for each client allowing them to focus on their core business or other areas of their personal lives with greater security and well being. We help our clients achieve their own unique goals by managing their assets, protecting their wealth and building their financial legacies. We put our clients' interests above our own or those of our firm, with a relentless commitment to excellence, integrity, and giving back to the community as primary governing values.

Proof Points:

- ◆ Ninety-three years (collectively) of successful professional relationships built on honesty, candor and mutual trust resulting in high rate of client referrals.
- ◆ The firm has an individual client focus. Financial planning for individual investors and their families is the firm's primary business with a culture of independence and objectivity (no "push" of proprietary products).
- ◆ Ongoing pursuit of professional competence and improvement. The team engages a client advisory board to improve services through valuable feedback and team members attend numerous due diligence and educational programs, as well as uphold relevant professional designations: Certified Financial Planner (CFP®), MBA in Financial Services, Wealth Management Specialist (WMS)

How We Deliver Results:

- ◆ Through a consultative, team-based approach that examines all aspects of our clients' financial lives.
- ◆ Provide a disciplined process, ongoing education, and a customized client engagement road map that crystallizes our client's objectives and provides key steps to meet their financial goals.
- ◆ Comprehensive wealth management plans are developed in coordination with other leading professionals, including attorneys and accountants.
- ◆ Full resources of a large, multinational financial services firm with access to award-winning research and one of the widest platforms of product choices and account types in our industry.

Strategic Focus:

- ◆ Client Focus – Business owners, medical professionals, and high-net-worth retirees in need of comprehensive financial planning.
- ◆ Service/Product Focus – Comprehensive wealth management plans for individuals and their families and employer-sponsored retirement plans and fiduciary oversight for businesses and medical groups.
- ◆ Geographic Focus – Nature Coast and surrounding counties.
- ◆ Referral Focus – Current clients and professional advisors of the Nature Coast.

Team Members:

Tracy Vaughn, CFP®, *Branch Manager*

Nanci Roth, *Branch Operations Specialist III*

Jim McLaughlin, WMS, *Senior VP, Investments*

Kris Flanders, *Registered Service Associate*

Amy Barbieri, CFP®, MBA, *Financial Advisor*

Services & Product Solutions Include:

Alternative Investments | Annuities | Asset Allocation | Banking Services thru RJ Bank | Bonds | Cash/Debt Management | Charitable Planning | Closed-End Funds | Disability Insurance | Education Planning | Employer-Sponsored Retirement Plans | Estate & Legacy Planning | ETFs | Fiduciary Oversight | Financial Planning | Fixed Income (Municipal & Taxable) | Identity Theft Prevention | IRAs | Life Insurance | Long-Term Health Care | Mutual Funds | Options | Professional Asset Managers | Public Offerings | Research | Retirement Planning | Stocks | Structured Products | Tax Planning | UITs

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