## Our Welcome to Raymond James Plan

A comprehensive process to get you settled into our new firm

### On-Boarding Process

- Open accounts
- · Transfer assets.
- Online access.

#### New Client Welcome Campaign

- Zoom calls to welcome you to RJ.
- Different topics & speakers each week.

#### Client Portfolio Alignment Process

- Integration of client portfolios into strategies.
- Client meetings as needed to review potential cap gains in brokerage accounts.

# Goals-Based Plan Campaign

 One-on-one meetings to review your plan.

