TRANSFERRING YOUR TRUST ACCOUNT CAN MAKE PLANNING EASIER

How a woman simplified her estate and trust planning with one simple move.

Liz was named beneficiary of a trust when her mom passed away. As the weeks and months went by, she became increasingly unhappy with the level of service and support she was receiving from the bank that held the trust account. She was also finding it hard to work with both her advisor and the bank trustee, and she had a nagging concern that her long-term financial plan and trust account were never quite in sync.

So, Liz decided to consolidate her investment and trust accounts with her Raymond James advisor. After consulting with her attorney and a Raymond James Trust consultant, they were able to quickly arrange to have Raymond James Trust named as the trustee. Now Liz enjoys a truly comprehensive approach to managing her investment portfolio and the convenience of having all her accounts safely in one place.

> "Now Liz enjoys a truly comprehensive approach to managing her investment portfolio and the convenience of having all her accounts safely in one place.*"

*This is a hypothetical illustration and is not intended to reflect any actual outcome.

RAYMOND JAMES® *Trust*

SIMPLIFY YOUR TRUST MANAGEMENT WITH THE FIRM THAT KNOWS YOU BEST

Raymond James Trust is a full-service trust company that can serve as trustee, agent or custodian of your trust account, or as a co-trustee if you wish to have a family member or other person as trustee. Our experienced trust consultants are dedicated to serving you and your financial advisor. They work in collaboration with your attorney and CPA to design and implement trusts based upon your specific needs and as an integral part of your overall financial plan. And we make transferring your trust easy and cost-efficient for you.* Ask your Raymond James financial advisor about transferring your trust account today.

*Some trust companies charge exit or liquidation fees.

WORKING WITH RAYMOND JAMES TRUST

With more than 23 years' experience, Raymond James Trust administers trusts exclusively designed for families and individuals – not institutions. We do not offer a "one size fits all" solution, but rather an individually tailored trust designed to meet personal needs both now and in the future. In fact, our customized investing approach makes a full array of investment choices and instruments available for use in our trust portfolios.

Choosing a trustee to manage your personal affairs could be one of life's most important decisions. Our experts understand the complexities and nuances of issues related to a broad range of personal and court-created trusts. We're comprised of experienced attorneys and trust experts, all of whom are committed to serving clients for the long term – throughout their lives and for generations to come.

BENEFITS OF TRANSFERRING YOUR TRUST ACCOUNT TO RAYMOND JAMES TRUST

Convenience of working with one advisor for all your financial accounts

All assets under one roof and statements from one firm

Balanced portfolio management by one financial advisor

Knowledgeable trust officers with 20 years' average experience

Opportunity for more investment choices for your trust savings

The Raymond James Trust Advantage

- Tenured and credentialed trust professionals
- Sound financial management through our financial advisor partnerships
- Tailored arrangements to suit the needs of benefit recipients
- Responsive client and affiliate partner service
- The highest standards of fiduciary conduct

Our Services

- Oversight of trust assets
- Accounting and record keeping
- Reporting of trust receipts and disbursements
- Tax reporting
- Performance reports and statements

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