

SWK

FINANCIAL PLANNING ADVISORS

of

RAYMOND JAMES®

SUMMER 2024 NEWSLETTER

Happy
Anniversary

We had a great party to celebrate our 5th Anniversary at Flyway Brewing. It doesn't seem possible that it has already been 5 years!



We are
excited to
≡ Welcome ≡
Ryan
Brisiel



First Vice President, Wealth Management
Ryan.Brisiel@RaymondJames.com

Congratulations!



Landon Summers passed the Securities Industry Essentials Exam



Be on the lookout for an email on signing up for e-delivery as we continue to place an emphasis on this!



Benefits of e-delivery:

- **CONVENIENCE** - Get access to documents and other key account details faster.
- **SECURITY** - Our digital systems are protected by sophisticated, multilayer technology safeguards and 24/7 threat monitoring.
- **ENVIRONMENT** - E-delivery saves paper, reduces emissions, conserves water and can help you unclutter your own space.
- **SAVINGS** - Go paperless and you may qualify for an annual credit, saving two kinds of green.

RAYMOND JAMES  **Cares**

More than 82,000 volunteer hours donated since 2012



269

Charitable Organizations Supported



3,371

Volunteers



8,315

Volunteer Hours Donated



88,650

Meals Served and Packed

Raymond James & Associates Inc., member NYSE/SIPC.

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