RAYMOND JAMES

Proposals and pitchbooks

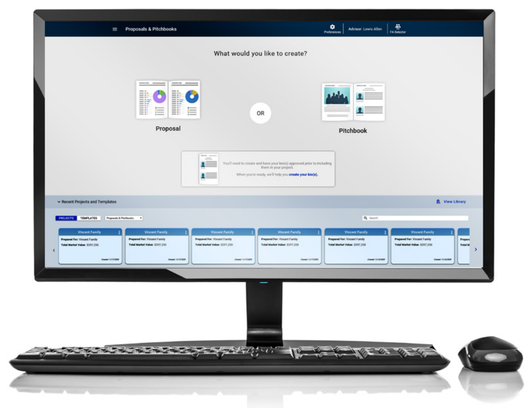
A customizable Wealth Management tool.

Proposal, the latest addition to the firm's Wealth Management suite, streamlines the creation of high-quality, customized proposals and/or pitchbooks. With this tool, you can easily engage your clients, prospects and referrals with materials that present your investment recommendations and tell a story about what sets you, your team and your practice apart.

Whether you need a proposal to provide detailed analysis and financial advice or a pitchbook to make a great first impression, the tool's built-in workflow will guide you every step of the way. Within minutes, you will have a professional, cohesive piece – aligned with your brand – that you can easily share online or in print.

KEY BENEFITS OF PROPOSAL

- **Integrated**
  Integration with other Raymond James tools enables you to include internal and external accounts, choose custom allocations, and add reports, Morningstar fact sheets and other custom materials to present a full financial picture and the benefits of your recommendations.
- **Marketing**
  To create a lasting impression and define what makes you unique, you can add bios for you and your team, information about your practice and Raymond James, and your own marketing materials.
- **Branding**
  Customize your content's overall look and feel with robust branding and personalization settings, including logo, cover image and color options.
- **Templates**
  Save time when putting together proposals or pitchbooks by creating and storing templates and reusable content in the Library, with an option to mail to a client or an office.
- **Compliant**
  A built-in compliance approval workflow and expiration alert enables you to automatically submit and track compliance status on bios. You can also send and/or record delivery of the Reg BI Form CRS and the Important Client Information disclosures for a client or prospect within the application.



ROLLOUT PLAN AND ROAD MAP

Ready to get started with Proposal? The tool is available firmwide and can be found in the Advisor Access menu under My Investments. Some planned enhancements include the following:

- The ability to generate proposals with multiple allocations
- Enhanced delivery options with Vault and eSignature
- Additional reports and marketing materials
- AMS products (e.g., Freedom, RJCS, etc.)